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Office of the Secretary of Transportation

Deregulation and Intercity Bus Operations in Florida

A Preliminary Study

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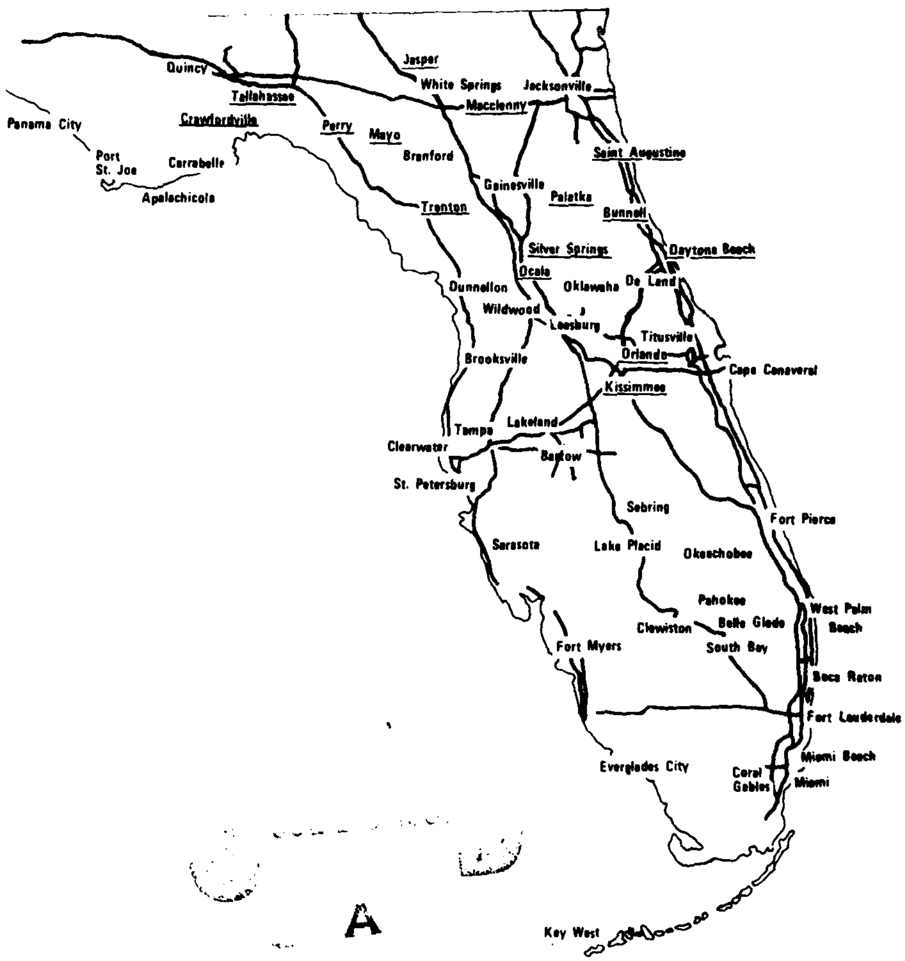

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16. Abstract

The impact of deregulation on the intercity bus industry and those who use the services of this industry is an issue of increasing interest given Florida's July 1, 1980, deregulation of motor carrier transportation of passengers and freight. As Florida represents a unique opportunity to examine bus service in a deregulated environment, the U.S. Department of Transortation (DOT) undertook a study of intercity bus operations in Florida. This preliminary study of the Florida bus industry examines the operation of the intercity bus industry in a deregulated environment and notes the changes in service that have occurred and how these changes have affected the users of intercity bus service. The study also shows the relation of Florida bus operations, both prior to and following deregulation, to interstate service.

As deregulation in Florida had only been in effect for seven months at the time of this study, it is too soon to determine the medium to long-term impacts of deregulation. The study found, however, that in the short run, regular-route carriers do not appear to have done much major restructuring of their northern Florida routes or started many new ones. The loss of regular-route passenger service observed in some of the towns has proved inconvenient, but service is generally available within a reasonable distance.

Competition in the charter and tour sector has, on the other hand, increased considerably, bringing with it an increased concern for safety by existing operators. Attractions and groups using charter and tour services appear to have adequate service available.

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DEREGULATION AND INTERCITY
BUS OPERATIONS IN FLORIDA

A Preliminary Study

by

Karen L. Borlaug
Edward H. Rastatter

U.S. Department of Transportation
~~Office of the Secretary~~
Office of Regulatory Policy
March 2, 1981

EXECUTIVE SUMMARY

I. Purpose and Background of Study

The impact of deregulation on the intercity bus industry and those who use the services of this industry is an issue of increasing interest given Florida's recent deregulation of motor carrier transportation of passengers and freight. Florida's motor carrier industries were deregulated effective July 1, 1980, when the Transportation Division of the Florida Public Utilities Commission became extinct under the State's sunset law, which requires periodic reenactments of regulatory powers. Safety regulations have been reenacted and authority for enforcement transferred to the State Department of Transportation.

The vast majority of States enforce some form of economic regulation of motor carriers, often using statutes virtually identical to those employed at the Federal level. In many cases, individual State regulation of buses is quite restrictive. On the interstate level, the Interstate Commerce Commission (ICC) regulates entry, price-setting, and other aspects of interstate bus operations in a manner similar to that applied to motor carriers of freight prior to enactment of the Motor Carrier Act of 1980 (MCA) in July 1980.

As Florida represents a unique opportunity to examine bus service in a deregulated environment, the U.S. Department of Transportation (DOT) undertook a study of intercity bus operations in Florida. This preliminary

study of the Florida bus industry is designed to examine the operation of the intercity bus industry in a deregulated environment and to note the changes in service that have occurred and how these changes have affected the users of intercity bus service. The study also shows the relation of Florida bus operations, both prior to and following deregulation, to interstate service.

II. Methodology

Professional staff of the Department of Transportation conducted personal interviews with charter and tour bus operators, regular-route bus operators, bus company agents, and users of intercity bus service located in northern Florida.[1/] The case studies presented in this report describe various operating characteristics of the carriers studied, levels of bus service available in particular towns and along given routes, and the effects of deregulation, as perceived by those interviewed.

III. General Results

Regular-Route Company Agents

Based upon information supplied by the carriers, DOT selected nine towns in northern Florida where regular-route service from either Greyhound or Trailways had been discontinued since deregulation. Bus service available in these towns was then examined in depth.

The nine towns studied range in size from under 1,000 to over 3,800 and all have good access to major highways. Several are located near major metropolitan areas and some have public passenger transportation alternatives (i.e., scheduled air service and Amtrak) available.

1/ The Interstate Commerce Commission conducted a similar study in southern Florida.

While the immediate impacts of deregulation differed among the nine towns studied, it appears that bus service available to people in these towns has not significantly decreased. Six of the towns had regularly scheduled bus service from either Greyhound or Trailways prior to deregulation and one town, Dunnellon, was a service point for both carriers. The remaining two towns were flag stops: Bunnell for Greyhound and Trailways and Silver Springs for Greyhound.

Dunnellon and Jasper are now scheduled service points for Trailways. Silver Springs is a flag stop for Greyhound and Trailways, and Trenton is a Trailways flag stop. The remaining five towns have no direct bus service but service is available in towns 9 to 21 miles away. In addition, Greyhound continues to offer charter service to Mayo and Dunnellon.

While the lack of regular-route passenger service in some towns is troublesome, package express service does not appear to be a problem. United Parcel Service (UPS) is used heavily by residents of these communities, generally with excellent results. UPS size and weight limitations were, however, noted by respondents as being more restrictive than those of the bus companies.

Regular-Route, Charter and Tour Bus Operators

Two regular-route bus companies were studied. Greyhound has extensive interstate operating authority and offers charter and package express service in addition to regular-route service. Florida Tour and Limo is strictly an intrastate carrier, which also offers charter service. Both carriers felt it to be too soon to judge the impacts of deregulation but noted favorably the new flexibility afforded carriers to structure their route systems.

Eight charter and tour operators of varying sizes were also examined. Four of these carriers had interstate authority; the remaining four were intrastate operators, but were interested in eventually acquiring interstate authority. Some also mentioned they favor Federal deregulation of buses. All eight carriers noted a significant increase in competition for their services following deregulation. Concern was expressed about the numerous "gypsy" operators entering the market and the influx of carriers from the North seeking to use their otherwise idle equipment during the winter months.

No doubt the most pervasive concern was that of safety. Enforcement of safety standards was generally considered inadequate and most carriers studied believed the "gypsy" operators present a safety hazard in terms of unsafe equipment and failure to carry adequate insurance coverage.

While some of the charter carriers studied were faring well following deregulation, others had less favorable experiences and one was considering leaving the business. The carriers did generally appear pleased, however, at the ease with which they can now change their operation in terms of service areas.

Charter and Tour Users

Based on observations of the DOT interviewers, informal conversations with various businesspersons, and an interview with the St. Augustine and St. John's County Chamber of Commerce, it appears that deregulation has been beneficial for users of charter and tour service. The increase in competition, especially in the charter sector has made it easier for people to make use of these services. Further, charter and tour services

are being provided by a broader range of bus companies than in the past. The larger concern appears often to be the need to increase the demand for various tourist attractions.

IV. Conclusions

As deregulation in Florida had only been in effect for seven months at the time of this study, it is too soon to determine the medium to long term impacts of deregulation. In the short-run, regular-route carriers do not appear to have done much major restructuring of their northern Florida routes or started many new ones. Deregulation may, however, have eliminated any cross-subsidies that existed in these carriers' Florida route systems by allowing carriers to eliminate or reduce service to unprofitable points. The loss of regular route passenger service observed in some of the towns studied has proved inconvenient, but service is generally available within a reasonable distance. Package express service tends to not be a problem due to the continued availability of service from United Parcel Service.

Competition in the charter and tour sector has, on the other hand, increased considerably, bringing with it an increased concern for safety by existing operators. Attractions and groups using charter and tour services appear to have adequate service available.

It should be remembered, however, that this study consists of a limited number of short-run observations. More time will have to elapse before any long-term effects of deregulation can be determined.

TABLE OF CONTENTS

I. INTRODUCTION

Purpose and Background of Study

The impact of deregulation on the intercity bus industry and those who use the services of this industry is an issue of increasing interest given Florida's recent deregulation of motor carrier transportation of passengers and freight. Florida's motor carrier industries were deregulated effective July 1, 1980, when the Transportation Division of the Florida Public Utilities Commission became extinct under the State's sunset law, which requires periodic reenactments of regulatory powers. Safety regulations have been reenacted and authority for enforcement transferred to the State Department of Transportation.

Prior to Florida's action in mid-1980, few unregulated intercity bus environments existed. Deregulation of intrastate bus operations in Alaska became effective in June 1980, and in November 1980 a bill to deregulate all motor carrier transportation was approved by referendum in Arizona. The legislation provides for a transition period through July 1, 1982 during which the Arizona Corporation Commission's regulatory duties will cease and authority over safety will shift to the State Department of Transportation.

The vast majority of States enforce some form of economic regulation of motor carriers, often using statutes virtually identical to those employed at the Federal level. In many cases, individual State regulation of buses is quite restrictive. On the interstate level, the Interstate Commerce Commission (ICC) regulates entry, price-setting, and other aspects of interstate intercity bus operations in a manner similar to that applied

to motor carriers of freight prior to enactment of the Motor Carrier Act of 1980 in July 1980.

As Florida represents a unique opportunity to examine bus service in a deregulated environment, the U.S. Department of Transportation (DOT) undertook a study of intercity bus operations in Florida. This preliminary study of the Florida bus industry is designed to examine the operation of the intercity bus industry in a deregulated environment and to note the changes in service that have occurred and how these changes have affected the users of intercity bus service. The study also shows the relation of Florida bus operations, both prior to and following deregulation, to interstate service.

Methodology

Professional staff of the Department of Transportation conducted personal interviews with charter and tour bus operators, regular-route bus operators, bus company agents, and users of intercity bus service located in northern Florida.1/

Different questionnaires (See Appendices A through D) were used for each of the four categories of individuals interviewed. These questionnaires provided data allowing for development of case studies of the businesses and individuals studied. As this study represents a pilot effort, DOT was limited to nine interviews for each questionnaire used.

1/ The Interstate Commerce Commission conducted a similar study in southern Florida.


Quincy
Tallahassee
Crawfordville
Panama City
Port St. Joe
Carrabelle
Apalachicola
Perry
Mayo
Branford
Trenton
Jasper
White Springs
Macclenny
Jacksonville
Saint Augustine
Gainesville
Palatka
Bunnell
Daytona Beach
Silver Springs
Ocala
Oklawaha
De Land
Dunnellon
Wildwood
Leesburg
Titusville
Orlando
Cape Canaveral
Brooksville
Kissimmee
Lakeland
Tampa
Clearwater
Bartow
St. Petersburg
Sebring
Fort Pierce
Sarasota
Lake Placid
Okeechobee
Pahokee
West Palm Beach
Belle Glade
Clewiston
Fort Myers
South Bay
Boca Raton
Fort Lauderdale
Miami Beach
Everglades City
Coral Gables
Miami
Key West

Despite variations in the focus of each questionnaire, certain types of information sought were consistent:

-- an evaluation of bus service prior to deregulation

-- an evaluation of bus service subsequent to deregulation

-- perceived impacts of deregulation on bus companies and individuals

The data obtained in these interviews allow for analysis of the general state of bus service in northern Florida.

The case studies presented in this report describe various operating characteristics of the carriers studied, levels of bus service available in particular towns and along given routes, and the effects of deregulation, as perceived by those interviewed.

Outline of Report

This report consists of four sections following the introduction. Sections II through IV contain the results of the interviews. This includes summaries of the findings in each category as well as case studies for each businessperson interviewed. General findings and conclusions from the study are presented in Section V.

II. REGULAR-ROUTE COMPANY AGENTS

Background

In December 1980, the Department of Transportation requested information from Greyhound and Trailways concerning service changes made in Florida since deregulation. Information provided the Department by Trailways and information sent to the Interstate Commerce Commission by Greyhound in response to a similar request is shown in Tables 1 and 2. Greyhound and Trailways have both increased total scheduled weekly miles since deregulation. Total scheduled weekly miles between November 1979 and November 1980 increased 8.0% and 7.3% for Greyhound and Trailways, respectively.

Using the information provided by Greyhound and Trailways, DOT selected nine towns in northern Florida where regular-route service from one of these major carriers had been discontinued since deregulation. Based on available information, the towns selected were not believed to have been picked up by any other carrier. Bus service available in these towns was then examined in depth.

Demographic Characteristics

The nine towns studied range in size from under 1,000 to over 3,800. Six of the towns are county seats and the chief town in the county. In addition, Wildwood, while not a county seat, is Sumter County's chief town.

Of the seven towns for which 1980 population figures were available,[1/] six experienced an increase in population between 1970 and 1980; Jasper, however, registered a decrease of 181 people.

1/ As Crawfordville and Silver Springs are not incorporated, preliminary 1980 figures were not available.

Table 1

Florida Service Changes Since Deregulation -- Trailways[1/]

Points Dropped (Trailways, Inc.)[2/]

Apalachicola
Carrabelle
Everglades City
Port St. Joe
Belle Glade
Crawfordville
Pahokee
Wewahitchka

Points Added (Trailways, Inc.)

Ft. Pierce
Titusville
Lake City
Clearwater
Starke
Cocoa
Leesburg
Ocala
Winter Garden
Melbourne

Points Added (Annett Trailways)

Lake Placid
Sebring
Avon Park
Sun Ray
Frost Proof
Lake Wales
Cypress Gardens
Winter Haven
Auburndale
Lakeland
Orlando
Winter Park

1/ Service changes as of December 31, 1980.
2/ Two of these points continue to be served by Glades Motor Lines.

Table 2

Florida Service Changes Since Deregulation -- Greyhound

Points Dropped 1/

Alachua	Jennings
Archer	Jct. US 27 & 70
Astor Park	Juniper Springs
Baldwin	Kennedy Space Center
Barberville	Lake Butler
Bartow	Lake Lona
Bithlo	Lantana
Branford	Lee
Bronson	Lloyd's X Road
Callahan	Lulu
Campbellton	Macclenny
Century	Mango
Charlotte Harbor	Marietta
Citra	Marineland
Clewiston	Mayo
Coleman	Moore Haven
Dania	Nalcrest
Deerfield Beach	Newberry
Dover	North Tampa
Dundee	Olustee
Dunnellon	Raiford
Ellaville	Reddick
Flagler Beach	Sanderson
Ft. White	Seffner
Glen St. Mary	Silver Springs
Graceville	South Bay
Havana	Trenton
Hawthorne	Trillacoochee
High Springs	Wellborn
Hobe Sound	West Frostproof
Holopaw	White Springs
Island Grove	Wildwood
Jasper	Williston
Jefferson	Yulee

1/ Information on points added was not provided. Ten of these points either had or gained service from another carrier.

Each of the eight counties where the towns studied are located increased in population between 1970 and 1980. Flagler County, where Bunnell is located, showed the most growth with a 137.2% increase, while Hamilton County, of which Jasper is the County Seat, grew the least at 9.9%. Florida as a whole increased in population by nearly 41%.

Locational Characteristics

The nine communities studied have good access to major highways. While the towns are from two to 33 miles from an Interstate highway, all are located on State highways and seven are also on U.S. highways.

Several of the towns are also located near major metropolitan areas. Macclenny is roughly 8 miles from Jacksonville's outer boundary, Crawfordville is nearly 20 miles from Tallahassee, Trenton is about 30 miles from Gainesville, and Bunnell is roughly 23 miles from Daytona Beach. The other towns tend to be near other relatively large communities. Wildwood is 8 miles from Leesburg, Silver Springs is 6 miles from Ocala, Mayo and Jasper are 21 and 15 miles respectively from Live Oak, and Dunnellon is 28 miles from Ocala.

Outside of the private automobile, there are passenger transportation alternatives available to some of these communities. Scheduled air service is available in Jacksonville, Daytona, Ocala, Gainesville, and Tallahassee. In addition, Amtrak serves Jacksonville, Tallahassee, Palatka, Ocala and Wildwood.

General Findings

While the immediate impacts of deregulation differed among the nine towns studied, bus deregulation does not appear to have caused significant problems in these towns. Six of the towns had regularly-scheduled bus

Table 3

Community Characteristics

Town	County	1970 Population	1980 Population	County Seat	Chief Town in County
Bunnell	Flagler	1,687	1,807	Yes	Yes
Crawfordville	Wakulla	750	N/A	Yes	Yes
Dunnellon	Marion	1,146	1,441	No	No
Jasper	Hamilton	2,221	2,040	Yes	Yes
Macclenny	Baker	2,733	3,829	Yes	Yes
Mayo	Lafayette	793	883	Yes	Yes
Silver Springs	Marion	900	N/A	No	No
Trenton	Gilchrist	1,074	1,124	Yes	Yes
Wildwood	Sumter	2,082	2,663	No	Yes

Sources: 1980 Census of Population and Housing, Preliminary Population and Housing Unit Counts: Florida, U.S. Department of Commerce, Bureau of the Census, February 1981.

Rand McNally Commercial Atlas and Marketing Guide, 1980.

Table 4

Population and Employment Information

	1970 Population	1980 Population	% Change in Population 1970-1980	Total Wholesale Trade 1972 Sales ($1,000)	Total Employees 1972	Value Added by Manufacturing 1972 Total ($1,000)
FLORIDA	6,791,418	9,567,112	40.9	19,983,912	343,100	5,787,800
Baker County	9,242	15,278	65.3	4,466	100	600
Flagler County	4,454	10,565	137.2	(2,090)	(d)*	(d)*
Gilchrist County	3,551	5,733	61.4	2,935	(d)	(d)
Hamilton County	7,787	8,561	9.9	9,963	(d)	(d)
Lafayette County	2,892	3,994	38.1	(1,099)	(d)	700
Marion County	69,030	118,800	72.1	234,727	3,600	61,300
Sumter County	14,839	22,927	54.5	12,007	500	7,000
Wakulla County	6,308	10,694	69.5	13,033	(d)	(d)

Sources: 1980 Census of Population and Housing, Preliminary Population and Housing Unit Counts: Florida, U.S. Department of Commerce, Bureau of the Census, February 1981.

Rand McNally Commercial Atlas and Marketing Guide, 1980.

*(d)=Not available to avoid disclosure of confidential data.

Table 5

Potential Ridership Measures

Town	Population (1980)	Ridership Generators	Previous Monthly Bus Revenues	Previous Bus Service*	Current Regular-Route Service*	Attempts by Community to Induce Service	Nearest Towns with Service	Distance from Interstate
Bunnell	1,807	Light economic activity	N/A	Trailways & Greyhound flag stop	None	No	Palatka 27 miles	5 miles to I-95
Crawfordville	N/A (1970 pop. 750)	Little economic activity	(30 to 60 passengers; 50 packages)	Trailways (P, X)	None	No	Tallahassee 20 miles	20 miles to I-10
Dunnellon	1,441	Light economic activity	$3,200	Greyhound & Trailways (P, C)	Trailways (P, X, C)	No	--	33 miles to I-75
Jasper	2,040	Light economic activity	N/A	Greyhound (P, X, C)	Trailways (P)	Yes, survey of bus users & petition sent to Trailways	--	6 miles to I-75
Macclenny	3,829	State hospital, light economic activity, Jacksonville communities	$1,900	Greyhound (P, X, C)	None	Yes, petition to Greyhound; news/TV stories; Chamber of Commerce	Jacksonville 15 miles	2 miles to I-10
Mayo	883	Light economic activity	$1,500 - 2,000	Greyhound (P, X, C)	None	Yes, petitions, letters to Greyhound	Live Oak 18 miles	24 miles to I-10
Silver Springs	N/A (1970 pop. 900)	Tourist attractions	N/A	Greyhound flag stop	Greyhound & Trailways flag stop (P)	No	--	10 miles to I-75
Trenton	1,124	Little economic activity; Gainesville communities; new nursing home	$300	Greyhound (P, X, C)	Trailways flag stop (P)	No	--	24 miles to I-75
Wildwood	2,663	Moderate, growing economic activity; Gainesville hospital	$4,000	Greyhound (P, X)	None	No	Leesburg 10 miles	5 miles to I-75

*P = passenger
X = package express
C = charter

service from either Greyhound or Trailways prior to deregulation and one town, Dunnellon, was a service point for both carriers. The remaining two towns were flag stops: Bunnell for Greyhound and Trailways, and Silver Springs for Greyhound.

Dunnellon and Jasper are now scheduled service points for Trailways. Silver Springs is a flag stop for Greyhound and Trailways, and Trenton is a Trailways flag stop. The remaining five towns have no direct bus service but service is available in towns 9 to 21 miles away. Greyhound continues to offer charter service to Mayo and Dunnellon.

While the lack of regular-route passenger service in some towns is troublesome, package express service does not appear to be much of a problem. United Parcel Service (UPS) is used heavily by residents of these communities, generally with excellent results. UPS size and weight limitations were, however, noted by respondents as being more restrictive than those of the bus companies.

Thus, the nine towns studied do not appear to be experiencing significant difficulties as a result of deregulation. It should be noted, however, that conditions may be worse in some of the towns not examined by DOT but on the same routes as the nine towns studied. For example, Jennings was on the same Greyhound route as Jasper prior to deregulation. Jasper residents petitioned Trailways to begin serving there, and the town subsequently became a Trailways service point; Jennings, however, did not fare as well. It is not known whether Jennings residents made any attempts to induce bus companies to provide service, nor can it be implied that any such attempt would have been successful. Further, Jasper may have been added because it is on or near an existing Trailways route, while Jennings might not be so located.

It should also be noted that deregulation in Florida had only been in effect for seven months at the time of this study. It is thus too soon to determine the medium-to-long-term impacts of deregulation. A number of towns were making concerted efforts to get bus service back. For instance, Mayo, dropped by Greyhound, petitioned Greyhound to come back; perhaps the same petition sent elsewhere will bring service. Macclenny's plight was the subject of television and newspaper stories, and the Chamber of Commerce and nearby hospital are also working hard to arrange new bus service there. So far, these efforts have been unsucessful, but eventually these towns may regain bus service. In the short-run, neither Greyhound nor Trailways appears to have done much major restructuring of their northern Florida routes or started many new ones.

The former regulatory system had, however, probably prevented these carriers from dropping extremely thin traffic points. Prior to deregulation, attempts had been made to drop at least several of the towns studied here, without success, and a number of the agents interviewed believed their bus company had probably exercised good business sense when it dropped them. Deregulation may thus have eliminated any cross subsidies that existed in these carriers' Florida route systems -- losses in some markets have to be made up through profits that are higher than they should be somewhere else or the company does not serve anyone. More time will have to elapse, however, before any long term effects of deregulation can be determined.

Bunnell

According to the owner/attendant at Ken's Service Center, Trailways used to stop on the street in front of the station every day at 11 o'clock. Greyhound used to provide similar service, on Schedule Table 182. She noted, however, that she had not seen either carrier in three to four months. She has owned the station for three years, but did not want the agency. Thus, there has not been a bus agency in Bunnell since that time.

Crawfordville

Crawfordville, Florida is an unincorporated town of about 1,000 people, about 20 miles due south of Tallahassee. It is located on US Route 319 and is about 20 miles from Interstate Route 10. Crawfordville had been served on Trailways Schedule Table 8100A. The agent was Mr. Harold G. Smith at the Wakulla Pharmacy.

According to Mr. Smith, the population of Crawford has increased in the past five years. Commercial activities nearby include a crab plant, a Forest Service installation, Centel (Telephone Company), and Florida Power and Light Company operations, and an Olin plant. These activities generate some seasonal package express shipments.

Previous to July 1980, Trailways offered one round trip per day to Tallahassee, although as many as five years ago there were two trips per day. Mr. Smith could not remember when that service was cut back. He could only remember perhaps 1-2 passengers per day, and also remembered that Trailways had been trying to stop its service to Crawfordville for years. When Trailways finally did stop serving Crawfordville, about July 31, 1980, the general reason given was that the service there was unproductive. No new carriers have picked up service to Crawfordville. The nearest town where both passenger and package express service continues to be available is Tallahassee, about 20 miles away. Tallahassee is accessible only by car.

In addition to the 1 or 2 bus passengers per day generated in Crawfordville, perhaps 50 or more packages per month were shipped via bus package express at the peak fall season. Mr. Smith believes that $2 a gallon gas will

bring back passengers to bus ridership. He also believes that a smaller bus company with smaller equipment might make a go of it. A local newspaper story on Trailways ending service mentioned a future van service for the area. Package express service is now handled by UPS and the Post Office.

As a general comment Mr. Smith added that the cessation of bus service to Crawfordville has not affected the town greatly because it is not especially isolated from Tallahassee. However, he believes that circumstances might be different in Carrabelle or Apalachicola, which are on the same route but are much more isolated.

Dunnellon

Dunnellon, Florida is located on US Highway 41, about 18 miles from Interstate 75. The largest city nearby is Ocala, about 24 miles away. Dunnellon used to be served on Greyhound Schedule Table No. 190.

The Greyhound agent in Dunnellon was Mr. Dinkins, the owner of Dinkins' Service Store, a farm and garden supply center. Mr. Dinkins volunteered that his is the oldest agency in Florida operating under continuous management, since 1928. According to Mr. Dinkins, the population of the city is about 1,500 but there are 8,000 people in a 3-county area: Dunnellon is right at the corner of Levy, Marion and Citrus counties. Mr. Dinkins noted that there is little commercial or manufacturing activity nearby, although a mattress manufacturer, plastic manufacturer, die shop, an industrial airport and agricultural activity generate a fairly regular package express business. He said that Greyhound had reduced service to Dunnellon before deregulation, around July of 1978, but he did not know why. He said that about July 8, 1980 he got a new Greyhound schedule with Dunnellon not included on it. This was the only notification he got that Greyhound had stopped serving there.

Trailways had also been serving Dunnellon, since 1937. Trailways reduced service to Dunnellon about the same time Greyhound stopped serving there, and Mr. Dinkins says that Trailways is continuing to cut service back. Trailways now offers 2 northbound and 3 southbound trips per day. Greyhound and Trailways both continue to offer charter service to Dunnellon, but Mr. Dinkins says that charter business is pretty slow.

In 1979 Mr. Dinkins showed about $38,500 in package and passenger revenues. Although the 1980 total was down only to $38,100 he believes that volume was down somewhat more than that, because of the effect of inflation on rates. Mr. Dinkins believes that fares have changed in the past year about 5% due to the fuel surcharge. About 80% of his regular route passengers, and about 50% of the package express shipments from Dunnellon are intrastate. He believes neither percentage has changed since July.

Mr. Dinkins believes bus service to Dunnellon is inadequate. He believes the town needs more local service to Ocala and also believes that bus package express service is inadequate. Other than Trailways package express service, UPS, Post Office and "trucks" are available to shippers.

Mr. Dinkins believes that the demand for transportation in Dunnellon will increase in the next 2 years because the number of retired people is increasing, and they do not want to drive. He believes that the volume of sales is the root of the problem to bus service to Dunnellon.

Jasper

Jasper, Florida until recently had been on Greyhound Schedule Table No. 167. The bus used to stop at the Jasper Gulf Service Station. Information for this case study was pieced together from one of the owners of the Jasper Gulf Station and Mrs. Marion Turner, Executive Secretary of the Jasper Chamber of Commerce.

Jasper is a town of about 2,200 people with a stable population over the past 5 years. It is located about 6 miles from Interstate 75, on US Highways 129 and 41.

The local hospital, a textile manufacturing plant, and numerous business establishments generated a fairly regular bus package express business, shipments being made or received on about half the buses. There are two junior colleges and a four-year college within 30 miles of Jasper, though they are perhaps too far to generate regular bus ridership.

According to Mrs. Turner, Trailways representatives came to her about 2 years ago, seeking authority to serve Jasper. On behalf of the Chamber of Commerce, Mrs. Turner signed an affadavit saying service by Trailways was desirable, but apparently Greyhound protested the application and Trailways did not get the authority. Greyhound dropped service to Jasper about July 7, 1980. Several weeks later Mrs. Turner and the Jasper Chamber of Commerce did a survey of Jasper's residents and businesses, listing past and potential business on regular route bus service, and sent it to Trailways. Shortly thereafter, about October 1, 1980, Trailways began stopping at Jasper. Jasper is now a flag stop for Trailways, with one

north and one south-bound bus a day, on Trailways Schedule Table 8101. Smith's Heating and Air Conditioning is attempting to become the agent to handle bus package express there for Trailways, but does not wish to handle the passenger business.

Although he was not personally responsible for bus service at the service station, the owner believes that Greyhound provided five buses per day prior to deregulation.

Greyhound charter service is still available to Jasper, as is service for Jasper senior citizens by the Suwanee Valley Transit Authority, and the Jacksonville Airport Limousine. The gas station owner did not know how this was handled. Other than these latter types of services, the nearest town where Greyhound regular route service continues to be available is in Live Oak, about 16 miles away. Both passenger service and package express service are available in Live Oak. Live Oak, however, is not accessible by either public transportation or taxi from Jasper.

Currently package express service is provided only by United Parcel Service. Mrs. Turner believes that this service is better than what Greyhound used to provide, although packages have to be the right size and weight to fit UPS requirements.

Additional information on the volume of bus service and fares and the like, previous to deregulation, were not available through either the service station owner nor through Mrs. Turner at the Chamber of Commerce.

Macclenny

Macclenny, Florida is a town of nearly 4,000 people about 50 miles due west of Jacksonville. It is 1½ miles from Interstate Route 10 running from Jacksonville to Tallahassee and is situated on US Route 90 about a block from Florida 121 (north-south) and Florida 228 (east-west). Until recently it was included on the Greyhound Schedule Table 198. The Greyhound bus used to stop at the Wholesale Discount Store in downtown Macclenny. The store sells furniture and also functions as a Western Union office. Mrs. Judy Archer provided the information for this report.

Mrs. Archer believes the population of Macclenny has increased rapidly over the past 5 years. Some of this increase has resulted from people who have moved there from Jacksonville. In addition the town has a new General Electric plant, a wire mill nearby, a fairly large nursery industry, banks, drug stores and a Florida Power and Light Company plant. Mrs. Archer believes that this commercial activity generated fairly regular package express business, and packages were usually shipped on both the morning and evening buses.

Although there are no nearby recreational attractions or colleges to generate bus ridership, some people do regularly commute back and forth to Jacksonville and Lake City. A small percentage of the regular scheduled bus service to Macclenny involved commuting to jobs in Jacksonville, perhaps 5 passengers per day. In addition, the Northeast State Hospital is nearby, and it generated a fair amount of ridership from people visiting patients.

No regular route service is now available to Macclenny. Greyhound had always provided service to Macclenny and according to Mrs. Archer had neither reduced nor improved service to Macclenny within the past five years prior to bus deregulation in Florida. Greyhound continues to make charter service available to Macclenny and Mrs. Archer says that charters to 6 or 7 football games per year are handled directly through the Greyhound office in Jacksonville.

According to Mrs. Archer, Greyhound called her about July 2 and announced that it was terminating service as of July 7, 1980. The only explanation she could recall was that Greyhound was stopping service because of bus deregulation. Mrs. Archer believes that Greyhound simply wanted to make a straight shot between Jacksonville and Tallahassee without stops.

No new carriers have started service to Macclenny in the meantime. Since Greyhound stopped service a number of attempts have been made to get bus service. The Orlando newspaper and Channel 4 in Jacksonville did stories on the cessation of service to Macclenny, and the State Hospital also wrote to Greyhound to try to get it to reconsider its decision. Meanwhile the Macclenny Chamber of Commerce is also trying to arrange some service to and from Macclenny.

The nearest towns where regular route bus service is now available are Jacksonville and Lake City, both about 15 miles away. No public transportation or taxis are available to those locations. Some workers now carpool to Jacksonville in the absence of bus service. Jacksonville and Lake City have both passenger and package express service available.

Mrs. Archer added that there is no other way to get to Jacksonville for many people because of the high gasoline prices. She also believes that even more people would have been using the bus service now and in the future to get to and from Jacksonville and the State Hospital nearby.

When it was running, the monthly volume of passenger business conducted in Macclenny was about $1,500 -- roughly 450 to 500 passengers per month. In addition, about $400 in package express business was conducted, roughly 250 packages per month. Mrs. Archer's commission was 15% on both ticket sales and package express. She believes that about 75% of the regular route passenger trips and package express shipments from Macclenny were intrastate in nature. Her commission used to be 10% on charter bookings, but she has not bothered with them since Greyhound stopped regular route service.

Mrs. Archer believes that bus passenger service now available to Macclenny is definitely inadequate. Passengers who continue to use bus service now must go to either Lake City or Jacksonville depending on their ultimate destination. She would like to see either Greyhound or Trailways come in and serve Macclenny. She is not angry at Greyhound, believing they did what they had to do and gave good service while they were providing it However, she did believe that Greyhound had lost lots of packages. She also believes that package express service is inadequate. Although she believes that UPS is faster, it is also more expensive, and she would like to have bus package express back.

Mrs. Archer believes that over the past 5 years her bus volume had been increasing rapidly. In the previous 3 years her volume went from $500 to $1,500 per month. She also believes that both passenger and freight service demand will continue to increase in the next two years due to gas prices.

Mayo

Mayo, in North Central Florida, had been until recently included on Greyhound Schedule, Table 169. The agent for Greyhound service was Mrs. Ada McCullers who owns McCullers' grocery. Mayo is directly located on U.S. Highway 27 and about 22 miles from Interstate 10. To use the bus, passengers used to come from all over Lafayette County as well as Taylor and Suwanee Counties. The largest town nearest to Mayo is Gainesville, located about 68 miles away.

Commercial activity in the area includes a cinder block plant, a fertilizer distributor, a building supply store and a medical and dental clinic, all of which used to generate more or less regular bus package express shipments. In addition there is a fairly large Soil Conservation Service installation in the town.

Mayo currently enjoys no interstate or intrastate bus service on a regular route basis. Mrs. McCullers knows of no commuter bus service, either. She says Greyhound stopped service about July 7, 1980. Her remembrance is that the Greyhound district supervisor called, announced the change, and said Greyhound was losing money serving Mayo. No new carriers have started service to Mayo. Although she knew of no bus companies who are planning to begin service to Mayo, numerous attempts have been made to get bus service. A petition circulated by the Mayo Chamber of Commerce, and letters from U.S. Senator Stone and State Representative Hodges, have been sent to Greyhound in an attempt to get Greyhound to reconsider its decision to stop serving Mayo. However, she does not believe that they have sent these documents to Trailways or any other bus companies to induce new service.

The nearest communities where bus passenger and express service continues to be available are Live Oak, about 21 miles away, and Perry, about 28 miles away. Neither town is available by public transportation or taxi. Mrs. McCullers is not certain whether bus service has changed in either of these latter towns but she has heard that some of the buses have been cut out.

Prior to the cessation of service to Mayo, Mrs. McCullers did about $1,500 to $2,000 per month in volume, both pasengers and bus package express combined. Her commission was 10%. She also books charters through this agency, with a commission of 10%. Greyhound continues to provide charter service to Mayo, and Mrs. McCullers believes there may be other companies. The high school sometimes uses a charter agent in Live Oak.

In the absence of bus package express, shippers in Mayo currently use either UPS or the Post Office, or travel to Live Oak to pick up bus packages.

Mrs. McCullers believes that over the past 5 years Mayo had experienced an increase in passenger ridership due to the increased gas prices. She expects such an increase would have continued for the next few years.

She would like to have Greyhound back. She is not angry at Greyhound, believing " if you are losing money it makes sense" to stop serving. She does not believe that either the size or location of Mayo had any effect on bus service to Mayo since it is right on the route to Gainesville.

Silver Springs

Acccording to two salespersons/clerks at the Silver Springs Majik Market, Greyhound has not maintained an agency in Silver Springs for approximately 10 years. If, however, people wish to travel to Daytona or other such points, Greyhound will stop and pick them up. Trailways, which now has an agency in Ocala, will provide similar service. The pickup point is located at the Fina gas station across the street from the Majik Market. One of the respondents emphasized, however, that Silver Springs needs more bus service than that currently being provided by Greyhound and Trailways. She did not elaborate further on this remark.

Silver Springs is located about 6 miles away from Ocala on a good road. As the two cities appear to run into one another, it is virtually impossible to tell where the boundary of one town ends and where that of the other begins.

Trenton

Trenton, Florida used to be served on Greyhound Schedule Table 169. It is located directly on US 129 about 24 miles from Interstate 75. Gainesville is the largest city nearby. Mr. Charles Hatch, an owner of the H&H Standard gasoline station, was the ticket agent. Although he believes that Trenton's population has increased a little in the past 5 years, according to the Census Bureau it has decreased slightly, to 1,124.

Although there is little commercial or manufacturing activity nearby, the agricultural activity in the area generates fairly regular package express shipments, for example, tractor parts. Although there are no recreational attractions in the area, people do commute 30 miles to Gainesville, to their jobs and to the college.

Greyhound stopped serving Trenton about July 10, 1980. It appears to have given no reason. However, Trailways began to serve Trenton with a flag stop, about 6 buses per day, almost immediately, on August 1. It provides passenger service only, no package express service. Mr. Hatch says the lack of package express service hurts Trenton, since shippers have to go to Chiefland to pick up their bus packages. Currently the choices for shippers is to use UPS, Central Truck Lines, MRF Trucks, or drive to Chiefland about 10 miles away. Mr. Hatch does not know whether charter service is available through Greyhound. He used to handle charter business, but can remember only one charter trip in the last 8 years.

There is a regular commuter-type service provided to senior citizens over 65 years of age, the TriCounty Senior Citizens Bus making one round trip per week to Gainesville.

Previous to July 1980, Mr. Hatch did about $100 per month in passenger volume (about 20 passengers outbound per month) and about $200 per month in package express (about 30 packages per month). His commission on both was 10%. About 75% of passenger trips and express shipments were intrastate in nature, mostly to Gainesville.

Mr. Hatch believes both passenger service and express service to Trenton are inadequate. He would like to be the agent for Trailways there.

Mr. Hatch believes that the community has grown rapidly in the last 5 years and will continue to do so in the next 2 years. He mentioned that dollar volume was only $18 per month 8 years ago. He also mentioned that there will be a nursing home built in Trenton which will contain 90 beds and generate a good bit of bus business.

Wildwood

Wildwood, according to a billboard on the northern outskirts of town, is known as the "transportation hub of Florida". Wildwood, as well as Sumter County in which it is located, is a growing area. This community has considerable commercial and manufacturing activity including a pipe factory, a box factory, a mobile home manufacturer and a utility shed manufacturer. In addition, a new corporation will soon be coming into the area. There has been an increase in commercial and manufacturing activity in the area over the past 5 years; this activity generates package express shipments.

Wildwood Quality Dry Cleaning was the only bus agency located in Wildwood. According to Mr. Kenneth McElroy, the owner of this establishment. Greyhound has always been the only bus company providing service to Wildwood. In addition, there is no charter, local or commuter bus service available to or from the town and no taxi service in Wildwood. Amtrak does, however, serve Wildwood.

Greyhound ceased service to this community following deregulation and no other carrier has picked up the service; Mr. McElroy is very upset about this loss of service. Greyhound used to run roughly 6 buses per day through Wildwood to points such as Ocala and Tampa and provide other services to New York and points all over the United States. The main service provided was between Wildwood and Gainesville; this service, frequently used by patients going to the Gainesville hospital, was available several times a day.

Prior to Greyhound's cessation of service to Wildwood, Mr. McElroy used to conduct roughly $4,000 per month in passenger and package express

business combined; package express shipments accounted for roughly 15% of this business. Approximately 400 or more passengers per month used bus service in Wildwood.

Mr. McElroy received a 10% commission on both passenger ticket and package express sales. He did not, however, book charters through the agency. He noted that he could have provided such service, but that people generally went to Leesburg or to a regular travel agency for such service.

While Greyhound was serving Wildwood, 50% or more of the trips were intrastate. This was also true for package express shipments, many of which went to Tampa and Orlando. Further, Mr. McElroy noted the relatively lower cost to ride the bus than to use alternative forms of transportation and that the number of passengers using Greyhound service was increasing prior to the cessation of service in Wildwood.

At considerable personal expense, Mr. McElroy constructed a waiting room and store next to his dry cleaning establishment for passengers waiting to take the bus. Although Greyhound had said they would pay for his construction, Mr. McElroy is considering taking additional action.
Mr. McElroy indicated that running a bus agency was generally not worth it if you have to hire additional staff.

When asked the reason for Greyhound dropping the service to Wildwood, Mr. McElroy said that he was under the impression that Greyhound felt the service to be unprofitable. He also felt that Greyhound's cessation of service was a political move, as the company was fighting the government. He felt deregulation gives Greyhound competition and that it will just cut a lot of peoples' throats.

While bus service is no longer available in this town, Leesburg, Bushnell, and Belleview all have bus service available; these towns are located roughly 9 to 14 miles away from Wildwood. To the best of Mr. McElroy's knowledge, all three towns mentioned have both package express and passenger service available. He noted that bus service in two of these towns has changed since deregulation occurred in Florida. While some bus service has been added in Leesburg, Bushnell is now down to 1 bus per day; prior to deregulation 3-4 buses used to come through that town. Mr McElroy did not know the status of service in Belleview. The majority of the bus passengers in Wildwood now go to Leesburg for most of their bus service.

Mr. McElroy believed that the volume of passenger business generated in the towns near Wildwood has probably increased as a result of changes in the bus service available in Wildwood, but he was not certain. He did not feel that bus passenger service available in Wildwood is adequate at this time, noting that Wildwood needs service from a major carrier.

Mr. McElroy felt that package express service now available in Wildwood is adequate due to the fact that UPS provides similar service. He noted, however, that many items could be shipped by bus that cannot otherwise be carried. For instance, the UPS weight limit of 50 pounds per package is lower than the 100 pound criterion of Greyhound. He also noted that trucks are more expensive than buses for small package service.

Mr. McElroy believed the size of his community has an effect on the transportation service available. He mentioned also that some businesses may not locate in a town such as Wildwood because they feel a town of that size cannot support the business.

Over the past 5 years, according to Mr. McElroy, Wildwood has not experienced any real changes in freight and passenger service in general. He noted, however, that the area is steadily growing and that everything around Wildwood is booming. He expects that the demand for freight and passenger service will increase within the next 2 years.

III. REGULAR-ROUTE, CHARTER AND TOUR BUS OPERATORS

Ten bus companies headquartered in northern Florida were studied. Two of these carriers are primarily regular-route carriers while the remaining eight are mainly charter operators.

Regular-Route Carriers

The two carriers studied in this category, Greyhound and Florida Tour and Limo, both offer services other than regular-route. Greyhound, of course, has extensive interstate authority and provides regular-route, charter, and package express service in Florida, obtaining most of its business through regular-route service. Florida Tour and Limo is strictly an intrastate operation; roughly 70% of its business derives from regular route operations while the remaining 30% comes from charter operations.

Representatives of both carriers felt it is too soon to fully judge the effects of deregulation in Florida. Greyhound noted, however, that it has been restructuring its Florida route system since deregulation, with roughly equal increases and decreases in service points, but with an overall increase in the population served.

Charter and Tour Operators

The eight charter and tour operators tended to be located in or near major metropolitan areas. The representatives of these carriers noted a considerable increase in the number of competitors for their services following deregulation in Florida. Closely related to this was a strong concern for safety. Many respondents noted that safety had greatly deteriorated following deregulation due to a lack of enforcement. Many of the carriers now in the market to provide charter services were felt to be unsafe while the carriers studied by DOT had good safety records and carried adequate liability insurance to protect their riders.

Table 6

FLORIDA BUS COMPANIES STUDIED

Name of Carrier	Headquarters	Primary Type of Service	Other Services	Interstate Authority
Bob-Bet Coach Lines	Palatka	Charter	none	no
Central Florida Bus Lines	Orlando	Charter	none	no
Florida Tour and Limo	Orlando	Regular-route	Charter	no
Greyhound	Phoenix, Arizona (Regional office: Jacksonville)	Regular-route	Charter, Package Express	yes
Grey Line of Orlando	Orlando	Charter and Tour	none	yes
Mid-Florida Coaches	Ocala	Charter and Tour	Special Operations	yes
Rabbit Bus Lines	Kissimmee	Charter and Tour	none	no
Shoreline Stages	Jacksonville	Charter and Tour	Commuter	yes
Superior Student Transport	Orlando	Charter and Special Operations	none	no
Surf Coast Tours	Daytona	Charter and Tour	none	yes

The charter and tour carriers studied varied considerably in terms of business characteristics, i.e., fleet size, number of employees, revenues, area served, etc. Fleets of these carriers ranged from two to 54 motor coaches to 14 fifteen-passenger vans. While several of these carriers did not show a profit for 1980, some showed good revenues.

Many respondents were pleased with the new flexibility afforded them in changing their intrastate service areas as a result of deregulation in Florida. Most did not reduce service while many had added service. All did, however, express concern about the influx of "gypsy" operators who were seen as unsafe. An additional problem was the large number of carriers from the North who come to Florida to provide charter service in the winter, thus utilizing buses that would otherwise be idle during that season. These carriers were considered a problem primarily because they do not have to pay the same license fees required of carriers domiciled in Florida. Further, the Florida carriers would like to have the same freedom to provide service in northern markets that these carriers have in Florida due to deregulation.

The overriding concern of the carriers studied was safety. The present level of safety inspection was sharply criticized and respondents were concerned about the safety of new carriers entering the market. Many also felt that continuing to maintain insurance coverage was necessary, but a high cost nonetheless that many of their competitors were choosing to avoid. This was believed to be unfair to the already-established carriers.

Four of the charter carriers studied had interstate authority; the other four carriers indicated they would like to expand their operations into other States and some mentioned that they favor Federal deregulation of buses.

While competition has increased in the charter and tour sectors, the increase appears most pronounced in the charter area. Tour service competition has increased overall, but in some markets is at levels roughly comparable to the pre-deregulation era.

Several respondents noted with dismay the loss in value of their operating certificates, many of which had been acquired at very high prices, up to $125,000.

Prospects for the future were mixed. Some carriers expressed interest in expanding their intrastate authority while others envisioned no service changes and one carrier was considering going out of business.

Bob-Bet Coach Lines

Palatka, Florida

Bob-Bet Coach Lines has been in operation for slightly more than a year and a half according to Mr. Robert Cross the owner and operator of this company, and his wife. This carrier provides intrastate service all over Florida on a daily basis. The majority of their traffic goes to major attractions in Orlando, but the carrier runs "just about everywhere".

The staff of this carrier is comprised of Mr. and Mrs. Cross and 2 part time drivers. Mr. Cross does all the mechanical work for the carrier and also drives buses on occasion. Bob-Bet's fleet is comprised of 2 buses, an MCI-type and a GM bus. Both buses appear to be in excellent condition; in fact, this interview was conducted in one of his buses. Mr. Cross mentioned that he has installed a bar (sans beverages) and card table in each of his buses, noting that people seem to appreciate this facility.

This carrier did not show a profit last year due primarily to some major expenses, i.e., an accident and a breakdown. The accident cost the carrier roughly $14,000.

The carrier deals with travel agents in cities such as Jacksonville and pays them a 10% commission.

Mr. Cross mentioned that Bob-Bet Coach Lines has an arrangement with a similar carrier in Ocala where one carrier will pick up passengers for the other. For instance, if Bob-Bet does not want to send out one of its buses due to a maintenance problem which may create a safety hazard, the carrier in Ocala will pick up the passengers, and vice versa.

At this time intrastate charters constitute this carrier's entire business. One of the agencies, however, is working on some tour packages and Bob-Bet hopes to create some charter work soon.

Mr. and Mrs. Cross have noted numerous changes in bus operations since deregulation in Florida. Prior to deregulation, this carrier was restricted to 19 Florida destinations and had to turn away work. Since deregulation, the carrier has been able to go where the people want to go. Mr. and Mrs. Cross have also seen more competition since deregulation. They noted that there are "people running around with equipment that are not needed"; there are also a lot of "gypsy" drivers, such as church buses, which do not have insurance. They noted, however, that "people don't know the difference" between the gypsy operator and the regular carrier. Mr. Cross said that his carrier hires drivers as the State prescribes. For instance, his drivers must have a physical examination and pass Florida DOT inspections.

Bob-Bet Coach Lines does not have ICC operating authority, but would now like to get it. Mr. Cross noted that the demand exists for his carrier to begin to provide interstate service. He said that people have travelled with him before and would like to use his service interstate. He also noted that he is a strong believer in the free enterprise, free market system and wants Federal deregulation of the intercity bus industry.

Prior to deregulation in Florida Mr. Cross did not seek to expand his intrastate charter authority. He said that he knew deregulation was in process and so he sat back and waited instead of going through the procedures.

Mr. Cross anticipated making intrastate charter service changes within the next 6 months. He said that he wants to be available to serve the entire state. He stressed that it should be up to the public, not the State or Federal government, where a bus can go. He mentioned that he can provide service more cheaply than other carriers. Mr. Cross also noted that Greyhound dropped some of its service through Palatka. He said however, that there are no problems with these regular route changes because the people in the town are not "bus-educated or bus-oriented".

Mr. Cross expressed a strong commitment to safety. He would be happy to see more frequent inspections, even every day. He feels that this would make the roads safer and would save him time as he would no longer have to check his buses himself.

Mr. Cross stressed the need for Federal and State governments to be as strict as possible on safety. Mr. Cross noted that he checks his buses before they leave on any trip, on arrival at their destination, and at other times. While a local inspection station now has the responsibility for inspecting buses in the area, Mr. Cross noted that this had become lax since deregulation, although the procedure had not been "too great" before deregulation. For example, his carrier operated one year before it was finally inspected; this inspection occurred at Disney World. The inspector found a problem with the speedometer cable in Mr. Cross's bus, a problem about which Mr. Cross already knew. Three buses of a major carrier, however, were red tagged by the inspector and had to be towed from the parking lot.

Mr. Cross noted that his schedules are set to take into account 50 mile per hour speeds, and said that this has worked out fine. Any driver getting a ticket must pay it.

Prior to deregulation, the carriers about which Mr. Cross knew used Greyhound as a guideline for setting its prices. Each carrier tried to stay under the prices Greyhound set. Mr. Cross noted that since deregulation it is difficult for him to tell what changes have been made in intrastate charter fares. For instance, prior to deregulation he had filed his tariff under "sightseeing", which results in a per passenger charge. He is now able to charge on a per mile basis for the bus.

Mr. Cross said "it was hard to say" how many competitors he faces on his intrastate charter routes. Sometimes it appears to be "the whole State". He noted that Greyhound and Trailways are competitors but that it depends on who is doing the marketing. He is also competing with churches, schools and anyone else who owns a bus. The amount of competition on these routes has increased since deregulation and this increase is experienced in all markets.

Mr. Cross mentioned at the end of the interview his desire to promote Federal deregulation of intercity buses. He noted again that he had had to turn away interstate business. A lot of people would like to travel with him, for instance to Georgia, but he does not have the authority.

Central Florida Bus Lines

Orlando, Florida

Central Florida Bus Lines has been an intrastate Florida carrier for about 12 years. It serves points all over Florida. According to Mr. Jack D. Chapman, the firm's Vice President, he has 20 full size buses, and employs about 30 people -- 20 of them drivers (13 full time), 3 full time mechanics, and the rest in management. He does not use agents. Revenues for 1980 were roughly $1 million, about the same as a year ago.

The bulk of his business is charter operations, the three most frequent destinations being Disney World and Sea World in Orlando, and Cypress Gardens.

Mr. Chapman said that prior to July 1980, he had never bothered either to expand his intrastate authority or to acquire interstate authority from the ICC. As for attempts to expand Florida intrastate authority, he said he never bothered because he knew it would never be granted. He related that a friend of his in the bus business had taken 14 months to get authority. As for ICC authority, he simply says he has procrastinated in seeking it, although he is now thinking of acquiring out-of-State authority as well as authority for packaging tours.

Since July 1980, Mr. Chapman has dropped a commuter service he ran between Orlando and Cape Kennedy. He has also seen a great deal of new competition on his intrastate Florida charter routes. He knew of at least four new companies who were operating on Florida charter routes -- two of them from out of state -- and believes that the charter business has

experienced the greatest change in competition since July. He has not made any changes in his own charter fares in Florida, adding that his January to January fares are guaranteed. He believes that, prior to July of 1980 the trend in intrastate charter fares in Florida roughly increased with inflation.

Mr. Chapman is also President of the Florida Association of Competitive Passenger Carriers, and says that he paid $75,000 of his own money to lobby for deregulation of buses in Florida. He also was mentioned in an article about Florida's deregulation in Bus Trader magazine.

Florida Tour and Limo

Orlando, Florida

Florida Tour and Limo has been in operation as an intrastate carrier in Florida since 1969. It is headquartered at Orlando Airport. It has intrastate authority all over Florida and serves points in 10 counties from Orlando Airport, as well as other airports in the vicinity.

According to Mr. Richard Foster, President, the company employs about 110 people, all full time -- 50 drivers, 6 maintenance men, 20 agents and the remainder in management. The agents are considered employees of the company and do not work on commission.

Florida Tour and Limo's fleet consist of 14 buses, 35 vans, 4 Cadillac limousines and 6 service vehicles. Revenues for 1980 were approximately $2.9 million. About 70% of this business derives from regular route operations, transferring passengers with baggage between airports, hotels etc. The other 30% derives from charter operations. This is a fairly radical change from three to four years ago, when regular route operations comprised 95% of his revenues and charters only 5%.

The three most frequent routes served by this company are those to and from the airports and hotels within 30 miles, charters to Disney World, and transferring passengers between the airport and military bases around Orlando.

Florida Tour and Limo has never acquired any interstate operating authority, nor have any attempts been made to do so. However, in the period prior to deregulation in Florida, Florida Tour and Limo made numerous

attempts to expand its intrastate authority and was almost always successful; in fact, that is how it got its charter authority. In 12 years, it has grown from $72,000 a year up to almost $3 million. Also prior to deregulation in Florida, Florida Tour and Limo sold its authority for operating between the Tampa Airport and Polk County.

Since the Florida deregulation, Florida Tour and Limo has experienced a significant decrease in revenues compared to the same period a year earlier. Mr. Foster attributes this decrease both to recession and new entrants into the business, in roughly equal proportions. In addition, he has expanded into much wider charter service including more origination points. Florida Tour and Limo made these service changes because it had the fleet to do so and could utilize it better. Asked to estimate his new competition on Florida routes, Mr. Foster could count at least eight competitors on the airport routes, including four new ones, plus motel limos, some of whom are now charging for their services. In addition some of the hotels are now beginning their own charter business; Mr. Foster mentioned especially the Sheraton Hotel which now has 10-12 brand new buses. This new competition is substantial, he claims, and includes a number of carriers from the North who bring their buses down to Florida for the winter season. He believes it a little unfair that Florida carriers cannot take their buses North for the summer months.

Mr. Foster anticipates applying for ICC charter and special operations authority within the next few months as well as authority to provide line service to points on the East coast.

Mr. Foster estimated that in the 5 years previous to deregulation intrastate passenger fares in Florida increased by about 10% per year. Since deregulation he believes the increase has been roughly the same, perhaps 5% increase as well as a 6% fuel surcharge.

He added at the end of the interview that he believes it is too early to see the effects of deregulation in Florida, but that he is beginning to see changes in Florida bus service, including an erosion in his revenue as well as new competitors.

Greyhound Regional Office

Jacksonville, Florida

According to Mr. G. Dotson, Regional Office Manager, Greyhound provides interstate and intrastate, regular route, package express, and charter service from this location. He feels that the bulk of the service provided is probably intrastate service since Jacksonville is the major gateway into Florida. The majority of this carrier's business by revenue, volume of traffic, and number of passengers is regular-route service.

Over the last two years, ridership on the regular route service and package express business have increased. Rates have also increased over the past year.

The majority of routes served from this location are along the East Coast, such as New York, and Miami.

Mr. Dotson noted that Greyhound has been restructuring its route system in Florida. Prior to deregulation he noted that it had been easy to increase service but hard to start serving new points. It had also been difficult to drop service. Mr. Dotson feels that the intrastate service changes made by Greyhound in Florida since deregulation are evenly split between increases and decreases. These intrastate service changes were made, he feels, due to ridership considerations. At some points, sufficient ridership did not exist, while at others Greyhound was able to pick up more people. He feels his carrier is now able to give long haul passengers a better ride, not requiring the buses to stop as frequently.

Mr. Dotson does not feel that Greyhound will be making any intrastate service changes within the next six months, noting that Greyhound is "pretty well settled in".

Within the past five years regular route rates have increased, especially since the price of oil increased. This has accounted for most of the rate increases. Mr. Dotson noted that the Public Service Commission tended to make it very difficult, however, to make rate changes. He also indicated that since deregulation, Greyhound has made one intrastate general rate increase. Mr. Dotson believed, however, that interstate rates have increased more than their intrastate counterparts.

Mr. Dotson did not know the number of competitors faced by Greyhound on its Florida routes. He noted, however, that competitors, mostly charter carriers are "cropping up daily" and that it is difficult to keep track of them. Some of these, he indicated, are northern companies. He also mentioned that Trailways has filed an application for more interstate authority, and is going to begin operating down the East Coast. Greyhound also faces competition from Amtrak, most notably on its Miami to St. Petersburg run. Greyhound does, however, have a formal interline agreement with Amtrak.

Mr. Dotson did not feel that there has been enough experience with deregulation yet to tell if it is good. He noted, however, that Greyhound had been successful in its restructuring, which would have been very difficult prior to deregulation. He is not averse to facing competition, but is opposed to "spotted" deregulation. For instance, Florida deregulated, but others have not. Carriers (i.e., Greyhound) want the freedom to get into or out of the market.

Greyline of Orlando

Orlando, Florida

Grey Line of Orlando, formerly Orlando Transit, operates interstate and intrastate charter and tour service. According to Mr. Pat Donnelly, Superintendent of Transportation, and his colleague Mr. Ernest Barlet, Grey Line has 155 employees, nearly all of whom work full-time, and has a fleet of 54 coaches. Grey Line uses agents to generate business and pays a 10% commission.

Virtually all of Grey Line's charter and tour service is intrastate to various attractions and cities throughout Florida, although interstate service, such as to Nashville, is also provided. Grey Line's business is nearly evenly split between charter and tour service.

Messrs. Donnelly and Barlet noted that Grey Line is "losing business every day to gypsies coming into town." This loss of business is roughly equal in charter and tour service. Grey Line faces competition from at least eight to ten carriers on its intrastate routes. Competition in both charter and tour service has increased since deregulation: "every day there's a new one."

Messrs. Donnelly and Barlet also noted that gypsies frequently enter the Orlando market with out-of-State tags. They feel this is unfair as Grey Line had to pay roughly $450 per bus twice a year for tags last year.

Grey Line obtained interstate operating authority from the ICC about three years ago; they experienced no protest problems from other carriers.

Since deregulation in Florida, Grey Line has stopped serving some of the hotels it used to serve. This carrier does not, however, anticipate making any service changes in Florida within the next six months.

Grey Line had to increase its rates prior to deregulation in order to keep up with inflation and the increased prices charged by the various attractions. This has also been true in the post-deregulation period.

Mid-Florida Coaches

Ocala, Florida

Mid-Florida Coaches is an interstate and intrastate charter carrier. The carrier's headquarters is also the location of the Trailways depot in Ocala. According to Mr. John Brejack, owner of Mid-Florida Coaches and the Trailways agent in Ocala, Trailways began service to Ocala roughly 5 months ago and now has 19 runs per day through Ocala.

Mid-Florida Coaches has had both its interstate and intrastate authority for 8 years. The bulk of this carrier's revenues is made by its charter operations; the carrier made a profit on its service in 1980.

Mid-Florida Coaches has a fleet of 7 regular motor coaches. The carrier employs about two or three part-time employees and 17 full-time employees, some of whom work for Trailways. Mid-Florida Coaches does not use agents.

Roughly 80% of this carrier's traffic is intrastate to points throughout Florida, with most of the traffic going to points such as Miami, Fort Lauderdale, and Key West. In addition to its charter operations, Mid-Florida Coaches runs intrastate tour and commuter services. Mid-Florida will provide service to any Florida town, regardless of size, where there is a demand.

Mid-Florida Coaches has ICC charter and special operations authority for 13 States. The carrier serves points in areas such as Tennessee, New York, Washington, DC, and North Carolina. The special operations authority allows Mid-Florida Coaches to sell its own trips and tours, book hotels, etc., to destinations such as Nashville and Atlantic City.

Mr. Brejack noted that, at first, his carrier was not ready for deregulation. During the first three to four months, his number of trips decreased because more bus companies were operating. Over time however, he determined where his carrier had to make adjustments and, in December 1980, Mid-Florida Coach's business had doubled from that of the same period a year earlier. Mr. Brejack faces competition from "every bus company in Florida" on his charter routes. Competition has increased in both charter and tour service in many areas.

Mr. Brejack feels there should be some deregulation, but stressed the need for safety regulation. He noted that the PSC has an office in Ocala and that prior to motor carrier deregulation, safety had been very important. Since deregulation, however, there has been no enforcement. He is concerned that now there are no criteria for safety, insurance, and inspections. He mentioned, however, that he brings his buses in for an inspection every 6,000 miles, whether or not there is anything wrong. He also stated that his carrier has never had an accident.

Mr. Brejack noted that there are now a lot of out-of-State buses on Florida roads. For example, a St. Petersburg company brought buses in from Ohio. He also noted that many buses are on the road with no insurance.

Prior to deregulation, Mr. Brejack tried three times to expand his intrastate charter authority, but was unsuccessful, having to fight protests from Greyhound, Trailways, and Gulf Coast. Mid-Florida Coaches also had protests on its applications for interstate authority, but the protests were withdrawn. Mr. Brejack said that his company had researched where Greyhound and Trailways were not able to support demand before making applications.

Mr. Brejack said he is going to "sit back and see what deregulation will do". He noted, however, that deregulation hurts some carriers because of the "gypsy" operators.

Over the past three to four years, this carrier's prices have not increased a great deal. According to Mr. Brejack, this is a family operation where he passes the savings on to his customers. He also mentioned that the carrier has its own maintenance system, which reduces costs.

Rabbit Bus Lines

Kissimmee, Florida

Rabbit Bus Lines, which is headquartered at an Exxon station, has been in operation since 1976, according to Mr. Lowell Kirkpatrick, the company's owner.

This bus line, engaged solely in intrastate operations, has two part-time and ten full-time employees. The company does not, however, use agents, although some of the hotels they serve buy vouchers and sell them to their guests.

Rabbit Bus Lines has a fleet of fourteen 15-passenger vans. Mr. Kirkpatrick stated however, that the "day of this vehicle is almost over". He feels it no longer will be feasible to operate, since no alternatives, such as converting to propane, have succeeded. He feels the days of anything less than a full-sized bus are numbered, and would consider buying one.

Mr. Kirkpatrick considers his company to be a "quasi-charter" operation; his business is strictly hauling tourists. He does not feel his operation constitutes charter service as such. Prior to deregulation, his company was restricted by the PSC to a three-county area; his original authority was from hotels in Orlando to tourist attractions. Mr. Kirkpatrick's application was protested by 5 or 6 carriers; his intrastate authority cost him $100-$125,000 to acquire and was paid off in March 1980, just four months prior to deregulation. Mr. Kirkpatrick is running basically the same type of service now, but he is now able to serve more attractions, such as Cyprus Gardens.

Mr. Kirkpatrick did not have his company's December earnings figures available at the time of the interview, but felt that Rabbit Bus Lines probably did not make a profit in 1980. Expenses were basically tied to the inflated price of gas and the cost of parts. He noted that Rabbit Bus Lines has lost its growth. The company used to have a 15-20% growth per year; revenues have been consistent recently, but expenses have risen.

The three areas most frequently served by Rabbit Bus Lines are Disney World, Sea World, and Rosie O'Grady's in downtown Orlando. He generally serves within a 50-mile radius. Last year his bus line drove over 1 million miles and had only one minor accident, which cost him $358.

Mr. Kirkpatrick was concerned about safety. He appeared careful in his selection of drivers, noting that the minimum age he will hire is 26; the majority of his drivers are in their late 40's or 50's. He also checks driving records. When he hires a driver, he sends him to Orlando for a physical. This procedure has detected problems such as blindness in one eye, heart trouble, and diabetes. He frequently uses Orange County school bus drivers for part-time help; these drivers are mature and stable and have already had physicals. A deputy sheriff and a highway patrolman also work for him.

Rabbit Bus Lines carries $1 million in liability insurance on equipment which translates into an annual premium of $1,800. Mr. Kirkpatrick noted that in order to operate in Walt Disney World, this level of insurance is required. He mentioned, however, that in practice Disney World lacks control of this and that a bus can just pay 50¢ at the gate and go in.

Mr. Kirkpatrick felt there will be a continuous deterioration in safety, but thought it was too early to tell yet. He mentioned that if the profit picture turns sour for bus lines, one of the first things to suffer will be equipment maintenance.

While Mr. Kirkpatrick has never sought ICC operating authority, he did attempt in 1979 to have a restriction removed on his Florida operating certificate concerning the number of passengers. The procedure cost him $987 and the PSC never acted on his request prior to deregulation. Mr. Kirkpatrick is seeking to have the $500 PSC fee returned to him.

Mr. Kirkpatrick indicated that he will go anywhere if he has a group of people, including Daytona and Cape Kennedy. He is, however, seriously considering shutting down. He noted that while Grey Line and Rabbit Bus Lines are authorized carriers, the clerks and other hotel employees will direct business to other bus lines. With deregulation, he feels there is nothing that can be done about it; under regulation, other carriers couldn't serve these markets.

Mr. Kirkpatrick noted that intrastate tour fares had increased in order to keep up with inflation. At the end of September, he had to increase his round-trip hotel to Disney World fare by 50¢, just to keep his "head above water"; he noted that fuel had risen 8¢ per gallon in the 14 days prior to the interview.

Shoreline Stages, Inc.

Jacksonville, Florida

Shoreline Stages, formerly Highland Tours, has been in operation in Florida since 1972. The carrier has also operated interstate since 1977, having ICC authority to serve all States east of the Mississippi River. Roughly eighty percent of its traffic goes to Georgia, Tennessee, North Carolina, South Carolina and Florida.

This carrier is solely a charter and tour operator although it does run some interstate commuter - type service. Shoreline Stages has twenty-three employees, most of whom work full-time for the company. The carrier uses travel agents and pays them a ten percent commission. Shoreline Stages owns and leases its equipment, primarily regular motor coaches. The company only rarely uses mini-buses as it often costs more to move one of them than it does a regular motor coach.

According to Thomas P. Shouvlin, the company's President and Robert Jones, General Manager, Shoreline Stages had annual revenues of roughly $890,000 in 1980. In terms of trips, about ninety percent of this carrier's traffic is interstate; this traffic constitutes the bulk of Shoreline Stage's business by revenue, volume of traffic, and number of passengers. Charter trips to Disney World and ski trips to North Carolina are the next most frequent destinations.

Messrs. Shouvlin and Jones indicated that they had not seen any real changes in competition since deregulation, although they noted some gypsy operators. Greyhound and Trailways tend to be their primary competitors on all their charter routes. Since that time, however, the company has

experienced an increase in revenues, but this is due to the initiation of its interstate commuter service, not deregulation. Prior to that time, virtually all of Shoreline Stage's business was charter service.

In 1979-1980, Shoreline Stages attempted to expand its interstate operating authority. The company received an ETA, a TA and then permanent authority; it was roughly eight months before Shoreline Stages acquired its permanent interstate authority which now enables it to run its commuter service. Messrs. Shouvlin and Jones indicated that this carrier does not particularly want to serve more States but would like be able to pick up passengers at more places in the States where the carrier is now authorized to serve.

Shoreline Stages did not attempt to expand its intrastate authority prior to deregulation; the carrier "never got around to it".

Messrs. Shouvlin and Jones expressed concern over bus safety. They noted that their company pays roughly $65,000 per year for accident/liability insurance. Church buses, on the other hand, have a bad reputation; they "do bad things with insurance". They also mentioned that one or two companies which have started operating in the Jacksonville area since deregulation are "pretty unreliable".

Despite this, Messrs. Shouvlin and Jones believed deregulation to be good; "free enterprise has a chance to flourish". They did note, however, that it hurts when they have to write off their operating rights, which are the only real value of the company. Shoreline's Florida rights were valued at $30,000 and its interstate rights at $75,000. They said they'll have to "wait and see what happens".

Messrs. Shouvlin and Jones noted a problem in getting enough good equipment; the carrier lost money last year, largely due to maintenance expenses.

Messrs. Shouvlin and Jones find demand for their service to be good. Interstate and intrastate fares, both prior and subsequent to deregulation, have been increasing at a rate roughly equivalent with inflation to help cover fuel and other costs. Shoreline's interstate charter fares are still felt to be lower than those of Greyhound and Trailways. They noted, however, that since deregulation, some church and "junk" companies have undercut companies; their riders tend to be one-time riders who come back to Shoreline Stages.

Superior Student Transport

Orlando, Florida

Superior Student Transport is an intrastate Florida Charter and Special Operations carrier which has been in operation since 1966. It employs abut 50 people -- 20 drivers (most of them part-time), 6 mechanics, and the rest are in management. The company uses no agents. It has a fleet of 50 school buses. Revenues for 1980 were roughly $2 million, about the same as for 1979.

According to Mr. Dan Zaffrans, the President, his special operations authority is identical to his charter authority, but simply permits him to charge by the head. His most frequent routes are charter operations to Disney World and other attractions around Orlando. He mentioned that he also gets calls to go out of State, but he lacks the ICC authority to do so. Until deregulation, Mr. Zaffrans had authority only to points south and west of the Suwanee River in Florida. He also does some business with Amtrak and the airlines. This business appears to consist of transferring passengers or take them shopping or sightseeing trips. He plans to expand his intrastate service in Florida within the next two to three years.

The company has not made any attempt to expand into interstate authority feeling that attorney fees and hearing costs would be prohibitive. Mr. Zaffrans would like to get interstate authority and would like to see deregulation of interstate buses.

Surf Coast Tours

Daytona, Florida

Surf Coast Tours, an interstate and intrastate charter and tour carrier, has been in business for three years, according to Betty Dufour, the carrier's Tour Director and the wife of the owner. In addition, the carrier has been affiliated with Grey Line for the past year and a half.

This carrier employs 25 people, roughly 15 of whom are full-time employees. The carrier's bus fleet is comprised of ten 47-53 passenger motor coaches.

Charter and tour service each constitute about 50% of this carrier's revenues, which resulted in a net loss in 1980. Mrs. Dufour felt, however, that tours will become a larger part of the carrier's operation in about 6 months.

This carrier has seen a significant decrease in revenues since deregulation occurred in Florida. According to Mrs. Dufour, the "gypsies" are undercutting other carriers. She feels the problem will become worse, noting that these operators are buying "junk buses", often up to 20 years old. Surf Coast's fleet, on the other hand, is comprised of buses ranging from 8 years old to brand new.

Surf Coast's three most frequent areas served are Disney World and Sea World for charters, and New Orleans for tours. Surf Coast is authorized to provide charter service in every State; the carrier has generally been successful in obtaining ICC authority, although it has required a lot of work and money. Surf Coast Tours was also generally successful in expanding its intrastate charter authority prior to deregulation.

Mrs. Dufour noted that interstate and intrastate charter fares have tended to increase roughly with the rate of inflation over the past few years. Since deregulation in Florida, Surf Coast Tours has raised all its fares by 10%.

On average, Surf Coast Tours faces competition from 5 or 6 charter carriers in the Daytona area. This represents an increase over the amount of competition prior to deregulation and Mrs. Dufour feels there will continue to be more competition from the "gypsies". The carrier faces roughly three competitors on its tour services, unchanged since deregulation.

IV. CHARTER AND TOUR SERVICE USERS

Deregulation appears to have been beneficial for users of charter and tour service in Florida. The increase in competition, especially in the charter sector, has made it easier for people to make use of these services. Further, the price of these services appears to be continuing to increase only to the extent necessary to keep up with inflation and rising fuel costs.

Based on the observations of the DOT interviewers, informal conversations with various businesspersons, and an interview with the St. Augustine and St. John's County Chamber of Commerce, it appears that there is charter and tour service available to meet demand and that these services are being provided by a broader range of bus companies than in the past. In fact, the only real problem seems often to be the need to generate more demand for visitors to various areas and attractions.

V. GENERAL FINDINGS AND CONCLUSIONS

As deregulation in Florida had only been in effect for seven months at the time of this study, it is too soon to determine the real impacts of deregulation based on the results of this study. In the short-run however, it appears that deregulation can be viewed favorably.

Regular-route carriers do not appear to have done any major restructuring of their northern Florida routes or started many new ones. The Greyhound representative interviewed did, however, mention that his carrier had been restructuring its route system following deregulation, with roughly equal increases and decreases in service.

Nine towns were studied where Greyhound or Trailways had ceased serving following deregulation. While the immediate impacts of deregulation differed among these towns, it appears that bus service available to people in the nine towns has not significantly decreased. The loss of regular-route passenger service observed in five of the towns has proved inconvenient, but service is generally available within a reasonable distance. Package express service tends not to be a problem due to the continued availability of service from United Parcel Service (UPS). UPS size and weight limitations were, however, noted by respondents as being more restrictive than those of the bus companies.

Although the nine towns studied do not appear to be experiencing any significant difficulties as a result of deregulation, it should be noted that conditions may be worse in some of the towns not examined by DOT but on the same routes as the nine towns studied.

The eight charter carriers studied were pleased with the effects of deregulation in that they have greater flexibility to structure their service areas. Most did not reduce service while many had added service. These carriers did, however, express considerable concern about safety. The present level of safety inspection was sharply criticized and respondents were concerned about the safety of new carriers, primarily "gypsy" carriers, entering the market. Many also felt that continuing to maintain insurance coverage was necessary, but a high cost nonetheless that many of their competitors were choosing to avoid. This was believed to be unfair to the already-established carriers.

In addition to problems with the influx of "gypsy" operators, the charter and tour operators studied were concerned about the large number of carriers from the North who come to Florida to provide charter service in the winter, thus utilizing buses that would otherwise be idle during that season.

Prospects for the future were mixed. Some carriers expressed interest in expanding their intrastate authority while others envisioned no service changes, and one carrier was considering going out of business.

Deregulation appears to have benefited users of charter and tour service in northern Florida. The increase in competition, especially in the charter sector, has made it easier for people to make use of these services.

All in all, deregulation appears to have had beneficial effects for the majority of carriers and users in the area studied. Competition has increased in the charter and tour sector, giving users of these services

greater service alternatives. While significant increases have not yet been seen in the regular-route sector, especially in rural areas, this may be due to the fact that the previous regulatory system in Florida restricted carriers from adding new points or dropping unprofitable ones. Deregulation may thus have eliminated any cross-subsidies that existed in these carriers' Florida route systems, by allowing carriers to eliminate or reduce service to unprofitable points.

At this juncture, it appears that the regular-route carriers are attempting to streamline their route systems before making major service changes. Further, the lack of restrictions on entry may encourage new, smaller regular-route carriers to seek to serve many of these small communities and rural areas.

Safety is a considerable problem. This is not, however, due to the elimination of economic regulation in Florida. Strong safety regulations and enforcement are needed in any regulatory environment to ensure the safety of the traveling public.

Nevertheless, it should be remembered, that this study consists of a limited number of short-run observations. More time will have to elapse before any long-terms effects of deregulation can be determined.

APPENDICES A - D

A

QUESTIONNAIRE

MOTOR BUS SERVICE TO SMALL COMMUNITIES:

STUDY OF FLORIDA POINTS DROPPED BY MAJOR CARRIERS

Name of Agency____

Affiliation____

Address____

City and State___________________________Zip Code______________

Name and Title of Respondent____________________________________

Interviewer_____________________________Date_________________

The U.S. Department of Transportation (DOT) and the Interstate Commerce Commission (ICC) are studying motor carrier service in Florida. An important aspect of this study is the availability of bus service in small communities. This brief survey will provide the DOT and ICC with information which will help us to evaluate the quantity and quality of bus service available to this and other small towns in Florida.

Your participation in this survey is voluntary and your name will be used in our report only with your approval.

Thank you for your cooperation.

Part One: GENERAL INFORMATION

1. What is the population of this community?________________

   Has the population increased or decreased over the past 5 years?

   ____Increased ____Decreased ____No Change

2. Does this community have any commercial or manufacturing activity?

   ____Yes ____No

   If yes, what type(s) of activity?________________

   ____

   ____

   Does this activity generate package express shipments?

   ____Yes ____No ____Don't Know

   If so, on a regular or occasional basis?________________

   Has there been any increase or decrease in commercial or manufacturing activity over the past 5 years?

   ____Yes ____No ____Don't Know

   If so, what changes?________________

   ____

   ____

3. Does this community have any recreational attractions and/or agricultural or educational (i.e., colleges) activity?

   ____Yes ____No

   If yes, what type?________________

   ____

   ____

4. What is the distance between this community and:

	Highway Number	Distance
an Interstate highway	______	______
a U.S. highway	______	______
a State highway	______	______
a county road	______	______

On average, how far do passengers travel between their homes and bus stop(s)? ______________________________

____

5. What large city is generally considered the nearest to this community?

____

How far away is this city? ______________________________

Do buses serving this community connect with buses in that city?

____Yes ____No ____Don't Know

6. At this agency, is the sole business at this location that of a bus agency?

____Yes ____No

If not, what is the main business at this location? ______________________________

____

7. Is this agency the only bus agency in this community?

____Yes ____No

If not, what is/are the name(s) and location(s) of the other agency(ies)?

____

8. Where are the bus stops in this town located? ______________________________

____

____

9. General Comments ____

____

____

____

Part Two: AVAILABILITY OF BUS SERVICE

1. Which regular-route bus companies now serve this community?

Interstate	Intrastate
____________________	____________________
____________________	____________________
____________________	____________________

Do services include package express?

Interstate ____Yes ____No Intrastate ____Yes ____No

Is all this business handled by this agency?

____Yes ____No

If no, how is it handled?____________________________________

____

2. Within the past 5 years and prior to July 1, 1980, did any bus companies stop serving, reduce service, or improve service to this community?

____Yes ____No ____Don't Know

If yes, which companies were these, what changes were made, and approximately when did they make these changes in service?

Company	Interstate or Intrastate	Type of Service Change	Approximate Date of Service Change
__________	__________	__________	__________
__________	__________	__________	__________
__________	__________	__________	__________

Why were these service changes made?__________________________

____

Has charter service grown at the expense of regular-route service?

____Yes ____No ____Don't Know

3. What charter, local, and/or commuter bus service is available to or from this community?

Company	Type of Service
__________	__________
__________	__________
__________	__________

Is this business handled by this agency?

____Yes ____No

If no, how is this handled?______________________________

____

4. Is any of the regular scheduled service to this community in the nature of a commuter service to jobs in nearby towns or cities?

____Yes ____No ____Don't Know

If so, what percentage of the regular-route trips are accounted for by this service?

________________ %

What percentage of the revenues?

________________ %

5. Since July 1, 1980, have any companies ceased or reduced service to or from this community?

____Yes ____No ____Don't Know

If yes, which companies and approximately when did service change?

Company	Interstate or Intrastate	Service Stopped or Reduced	Approximate Date of Service Change
____________	____________	____________	____________
____________	____________	____________	____________
____________	____________	____________	____________

6. Did the companies, if any, who stopped or reduced service to this community after July 1, 1980, give you any explanation of why they planned to make these service changes?

____Yes ____No ____Don't Know

If yes, what were the reasons?

Company	General Explanation
____________	____________
	____________
	____________
____________	____________
	____________
	____________
____________	____________
	____________
	____________

7. Since July 1, 1980, have any new carriers started service to this community?

____Yes ____No ____Don't Know

If yes, what are the names of these carriers, what type(s) of service do they offer, and approximately when did they begin to serve?

Company	Type of Service	Approximate Date Service Started
____________	____________	____________
____________	____________	____________
____________	____________	____________

What types of equipment are they using (e.g., vans, used buses)?

____

Why did these carriers initiate service?______________________________

____

8. Since July 1, 1980, have any carriers already serving this town increased their service here?

____Yes ____No ____Don't Know

If yes, what are the names of these carriers and to what extent has service increased?

Company	Interstate or Intrastate	Amount of Increase
____________	____________	____________
____________	____________	____________
____________	____________	____________

Why did these carriers increase service?______________________________

____

9. Do you know of any bus companies who are planning to begin or increase service to this community within the next 6 months?

____Yes ____No ____Don't Know

If yes, what are the names of these companies and when is this service expected to begin?

Company	Intrastate or Intrastate	Date Service Expected to Begin

Why are these companies planning to provide this service?____________

____

What types of equipment will be used?____________________

____

10. If bus service is no longer available in this community, are there any nearby towns where such service is available?

____Yes ____No ____Don't Know

If yes, which are the nearest towns and approximately how far away are these towns?

Community	Approximate Distance

Are these towns accessible by local public transportation or taxis?

Community	Accessible
	____Yes ____No ____Don't Know
	____Yes ____No ____Don't Know
	____Yes ____No ____Don't Know

Do these towns have both passenger and bus package express service available?

Community	Passenger Service Available and Type	Package Express Service Available
____________	____________	____________
____________	____________	____________
____________	____________	____________

11. In the towns just mentioned, has bus service changed since July 1, 1980?

____Yes ____No ____Don't Know

If yes, in what ways?

Community	Changes in Bus Service
____________	____________
____________	____________
____________	____________

12. Taking into account the bus service available in this community and in nearby towns, do you feel bus service available to the residents of this community has changed since July 1, 1980?

____Yes ____No ____Don't Know

If yes, in what ways? ____

____

____

13. General Comments ____

____

____

____

Part Three: DEMAND FOR AND USE OF BUS SERVICE

1. Prior to July 1, 1980, roughly what dollar volume of passenger business was conducted at this agency on a monthly basis?

   $______________/month.

   Roughly how many passengers per month used bus service?

   _______________/month.

   What dollar amount of package express business was conducted?

   $______________/month.

   Roughly how many packages were sent per month?

   _______________/month.

2. Since July 1, 1980, roughly what dollar volume of passenger business do you generally conduct at this agency per month?

   $______________/month.

   Roughly how many passengers per month use bus service?

   _______________/month.

   What dollar amount of package express business?

   $______________/month.

   Roughly how many packages are sent per month?

   _______________/month.

3. What is your commission on ticket sales?______________________________

   Package express?____

4. Do you book charters through this agency?

____Yes ____No ____Don't Know

If so, what is your commission on these bookings?____________________

What carriers provide charter service to/from this community?

Name of Carrier

____

____

____

5. Has there been any significant change in the volume of business since July 1, 1980, compared to the same period a year earlier?

____Yes ____No ____Don't Know

If yes, what type of change?____

____

6. Roughly what percentage of regular-route passenger trips from this community are intrastate trips?

____________________%

Roughly what percentage of package express shipments from this community are transported intrastate?

____________________%

7. Since July 1, 1980, has the percentage of intrastate passenger trips changed?

____Yes ____No ____Don't Know

If so, in what way?____

Has the percentage of intrastate package express shipments changed?

____Yes ____No ____Don't Know

If so, in what way?____

8. Since July 1, 1980, has the volume of passenger business generated at the nearby towns mentioned earlier changed as a result of changes in bus service available in your community?

____Yes ____No ____Don't Know

If yes, what type of change and in which towns?

Community	Increase	Decrease

9. Has there been any change in package express business in these nearby towns?

____Yes ____No ____Don't Know

If so, what change and in which towns?

Community	Increase	Decrease

10. Do you believe bus passenger service now available in your community is adequate?

____Yes ____No

If no, what changes do you feel are needed?____________________

____

____

11. Where do passengers now go for most bus service?____________________

____

____

12. Do you feel bus package express service now available in your community is adequate?

___Yes ___No

If no, what changes do you feel are needed?________________________

____

____

13. Is package express service available to this town from carriers other than bus companies?

___Yes ___No ___Don't Know

If yes, who offers this service?__________________________________

____

14. In general, have passenger fares changed in the past year?

___Yes ___No ___Don't Know

If yes, what type of change and roughly how much?

___Increase ___%

___Decrease

15. In general, have bus package express rates changed in the past year?

___Yes ___No ___Don't Know

If yes, what type of change and roughly how much?

___Increase ___%

___Decrease

16. Since July 1, 1980, have passenger fares in general changed?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

17. Are all carriers making generally the same type of passenger fare changes, if any?

____Yes ____No ____Don't Know

If no, please describe the carriers' behavior.____________________

____

____

18. Since July 1, 1980, have package express rates in general changed?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

19. Are all carriers making generally the same type of package express rate changes, if any?

____Yes ____No ____Don't Know

If no, please describe the carriers' behavior.____________________

____

____

20. General Comments______________________________

____

____

____

Part Four: GENERAL TRANSPORTATION AND ECONOMIC TRENDS

1. Over the past five years, has this community experienced any changes in freight and passenger service in general?

   ____Yes ____No ____Don't Know

   If yes, what changes?____

   ____

2. Since July 1, 1980, have there been any changes in general?

   ____Yes ____No ____Don't Know

   If yes, what changes?____

   ____

3. Do you expect that the demand for transportation services in this community will increase in the next 2 years?

   Freight Service: ____Yes ____No ____Don't Know

   Passenger Service: ____Yes ____No ____Don't Know

4. Would you like to see any changes in the transportation to/from your community?

   ____Yes ____No ____Don't Know

   If so, what types of changes? ________________________________

   ____

5. Do you feel the size and/or location of your community has any effect on the transportation service available?

   ____Yes ____No ____Don't Know

   If so, in what ways?____

   ____

6. General Comments ____

____

____

____

B

QUESTIONNAIRE

MOTOR BUS SERVICE TO SMALL COMMUNITIES:

STUDY OF FLORIDA REGULAR-ROUTE BUS OPERATORS

Name of Company ______________________________

Address ______________________________

City and State ______________________________ Zip Code ______________

Name and Title of Respondent ______________________________

Interviewer ______________________________ Date ______________

The U.S. Department of Transportation (DOT) and the Interstate Commerce Commission (ICC) are studying motor carrier service in Florida. An important aspect of this study is the availability of bus service in small communities. This brief survey will provide the DOT and ICC with information on the operations of bus companies in Florida, most notably as to how rate and service decisions are determined.

Your participation in this survey is voluntary and your name will be used in our report only with your approval.

Thank you for your cooperation.

Part One: GENERAL INFORMATION

1. How long has this carrier been in operation?

   Interstate__________ Intrastate (Florida)__________

2. Where is the headquarters of this carrier located?__________________

3. Roughly how many points do you serve from this location?

   Interstate____________________

   Intrastate (Florida)__________

4. Roughly what is the population range of the points you have served in the past year?

   ____

5. How many people does this carrier employ?

	Part-time	Full-time
Drivers	__________	__________
Mechanics	__________	__________
Agents	__________	__________
Management	__________	__________
Other	__________	__________

6. What is the range of commissions for your agents?__________________

7. How large is your bus fleet?______________________________

   What type(s) of vehicles?______________________________

8. Roughly what was your annual revenue for 1980? $__________________

9. General Comments______________________________

   ____

   ____

   ____

Part Two: SCOPE OF CARRIER'S OPERATIONS

1. What types of bus service does this company provide from this location? (Check all which apply)

Type of Service	Interstate	Intrastate
Regular Route	____	____
Package Express	____	____
Charters	____	____
Tours	____	____
Commuter	____	____
Special Operations	____	____
(Specify________________)		

2. In each of the above categories, where applicable, what percentage by revenue of your traffic from this location is intrastate in nature?

Type of Service	% Intrastate Service
Regular Route	____
Package Express	____
Charters	____
Tours	____
Commuter	____
Special Operations	____

3. What type of service constitutes the bulk of this carrier's business?

By revenue______________________________________

By volume of traffic____________________________

By number of passengers_________________________

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4. Roughly what were the revenues generated by each type of service provided by this carrier last year? What, if any, has been the change in revenue for each type of service over the past 5 years?

Type of Service	Revenue	% Change over Past 5 Years
Regular Route	________	________
Package Express	________	________
Charters	________	________
Tours	________	________
Commuter	________	________
Special Operations	________	________

5. Since July 1, 1980, have you experienced any significant change in revenues compared to the same period a year earlier?

____Yes ____No ____Don't Know

If so, what type of change and approximately how much?

____Increase ____%

____Decrease

Were these changes roughly the same for all types of service provided?

____Yes ____No ____Don't Know

If no, what were the differences? ________________________________

____

____

6. What do you consider to be this carrier's 3 most frequent routes served?

1. ________________________________
2. ________________________________
3. ________________________________

7. General Comments____

Part Three: EFFECTS OF REGULATION ON CARRIER OPERATIONS

1. Does this carrier have ICC operating authority?

___Yes ___No

If yes, what type(s) of authority?

___Regular Route

___Charter

___Other (Specify ________________________________)

In how many States are you authorized by the ICC to serve?__________

2. Within the past 5 years, and prior to July 1, 1980, has this carrier sought to expand its interstate authority?

___Yes ___No ___Don't Know

If yes, when were the attempts made and were they successful?

Expansion Attempt	Success		
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know

3. Within the past 5 years, and prior to July 1, 1980, have you sought to expand your intrastate authority in Florida?

___Yes ___No ___Don't Know

If yes, when were the attempts made and were they successful?

Expansion Attempt	Success		
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know

4. Within the past 5 years, and prior to July 1, 1980, has this carrier sought to cease interstate service to any point(s)?

____Yes ____No ____Don't Know

If yes, when were the attempts made and did the ICC allow cessation of service?

Reduction Attempt	Success		
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know

Were any of these points in Florida?

____Yes ____No ____Don't Know

5. On your solely intrastate operations in Florida, within the past 5 years, and prior to July 1, 1980, have you sought to cease intrastate service to any of your Florida points?

____Yes ____No ____Don't Know

If yes, when were the attempts made and were you allowed to cease service?

Reduction Attempt	Success		
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know

Roughly how many points, if any, did you wish to drop?

________________________ ________________N/A

6. Since July 1, 1980, have you sought to make any changes in your interstate authority?

____Yes ____No ____Don't Know

If yes, what types of changes were sought and were they allowed by the ICC?

Type of Change	Allowed by ICC		
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know

7. Why did you want to make these interstate changes?____________________

____

____

8. Since July 1, 1980, have you made any intrastate service changes in Florida?

____Yes ____No ____Don't Know

If so, what types of changes were made and in what types of service?

____

____

____

9. Why did you make these intrastate service changes?____________________

____

____

10. Do you anticipate making any intrastate service changes in Florida within the next 6 months?

____Yes ____No ____Don't Know

If so, what types of changes and why?________________________________

____

____

____

11. Within the past 5 years, and prior to July 1, 1980, what has been the trend in interstate regular-route passenger fares?

____Increase ____Decrease ____No Change ____Don't Know

What has been the magnitude of this change if any? ____________ %

12. Within the past 5 years, and prior to July 1, 1980, what has been the trend in intrastate regular-route passenger fares in Florida?

____Increase ____Decrease ____No Change ____Don't Know

What has been the magnitude of this change, if any? ____________ %

13. Since July 1, 1980, has this carrier made any changes in regular-route interstate passenger fares?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

On what basis did you initiate requests for fare increases, if any?

____General Rate Increases ____N/A

____Individual Action

14. Since July 1, 1980, has this carrier made any changes in regular-route intrastate passenger fares in Florida?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

15. On average, how many bus competitors do you face on your intrastate Florida routes?

____

Do you face competition from AMTRAK on any of your routes?

____Yes ____No

If so, on how many routes?______________________________

16. Has bus competition on the Florida routes you served changed since July 1, 1980?

____Yes ____No ____Don't Know

If so, in what way?

____Increase ____Decrease

17. General Comments______________________________

____

____

____

C

QUESTIONNAIRE

MOTOR BUS SERVICE IN FLORIDA:

STUDY OF FLORIDA CHARTER AND TOUR BUS OPERATORS

Name of Company ______________________________

Address ______________________________

City and State ______________________________ Zip Code ______________

Name and Title of Respondent ______________________________

Interviewer ______________________________ Date ______________

The U.S. Department of Transportation (DOT) and the Interstate Commerce Commission (ICC) are studying motor carrier service in Florida. An important aspect of this study is the availability of charter and tour bus service. This brief survey will provide the DOT and ICC with information on the operations of bus companies in Florida, most notably as to how rate and service decisions are determined.

Your participation in this survey is voluntary and your name will be used in our report only with your approval.

Thank you for your cooperation.

Part One: GENERAL INFORMATION

1. How long has this carrier been in operation?

   Interstate__________ Intrastate __________

2. Where is the headquarters of this carrier located?__________

3. What general geographic areas do you serve from this location?

   Interstate__________

   Intrastate __________

4. How many people does this carrier employ?

	Part-time	Full-time
Drivers		
Mechanics		
Agents		
Management		
Other		

5. What is the range of commissions for your agents?__________

6. How large is your bus fleet?__________

   What type(s) of vehicles?__________

7. Roughly what was your annual revenue for 1980? $ __________

8. General Comments__________

Part Two: SCOPE OF CARRIER'S OPERATIONS

1. What types of bus service does this company provide from this location? (Check all which apply)

Type of Service	Interstate	Intrastate
Regular Route	____	____
Package Express	____	____
Charters	____	____
Tours	____	____
Commuter	____	____
Special Operations	____	____
(Specify________)		

2. In each of the above categories, where applicable, what percentage of your traffic is intrastate in nature?

Type of Service	% Intrastate Service
Regular Route	____
Package Express	____
Charters	____
Tours	____
Commuter	____
Special Operations	____

3. What type of service constitutes the bulk of this carrier's business?

By revenue________________________

By volume of traffic________________________

By number of passengers________________________

4. Roughly what were the revenues generated by each type of service provided by this carrier last year? What, if any, has been the change in revenue for each type of service over the past 5 years?

Type of Service	Revenue	% Change over Past 5 Years
Regular Route	____________	____________
Package Express	____________	____________
Charters	____________	____________
Tours	____________	____________
Commuter	____________	____________
Special Operations	____________	____________

5. Since July 1, 1980, have you experienced any significant change in revenues compared to the same period a year earlier?

____Yes ____No ____Don't Know

If so, what type of change and approximately how much?

____Increase ____%

____Decrease

Were these changes roughly the same for all types of service provided?

____Yes ____No ____Don't Know

If no, what were the differences?____________________________________

____

____

6. What are this carrier's 3 most frequent areas or routes served?

1.____

2.____

3.____

7. Roughly what is the population range of the points you have served in the past year?

____

8. General Comments____________________________________

____

____

____

Part Three: EFFECTS OF REGULATION ON CARRIER OPERATIONS

1. Does this carrier have ICC operating authority?

___Yes ___No

If yes, what type(s) of authority?

___Charter

___Regular Route

___Other (Specify ______________________________)

In how many States are you authorized by the ICC to serve?___________

2. Within the past 5 years, and prior to July 1, 1980, did this carrier seek to expand its interstate charter authority?

___Yes ___No ___Don't Know ___N/A

If yes, when were the attempts made and were they successful?

Expansion Attempt	Success		
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know

3. Within the past 5 years, and prior to July 1, 1980, did you seek to expand your intrastate charter authority in Florida?

___Yes ___No ___Don't Know ___N/A

If yes, when were the attempts made and were they successful?

Expansion Attempt	Success		
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know
__________	___Yes	___No	___Don't Know

4. Within the past 5 years, and prior to July 1, 1980, did this carrier reduce or cease interstate charter service to any point(s) or regions?

____Yes ____No ____Don't Know

If yes, approximately when did you make these changes and to what regions?

Reduction Attempt Date	Region
____________	______________________________
____________	______________________________
____________	______________________________

Were any of these points in Florida?

____Yes ____No ____Don't Know

5. On your solely intrastate operations in Florida, within the past 5 years, and prior to July 1, 1980, did you reduce or cease intrastate service?

____Yes ____No ____Don't Know

If yes, approximately when did you make these changes and to what regions?

Reduction Attempt Date	Region
____________	______________________________
____________	______________________________
____________	______________________________

6. Since July 1, 1980, have you sought to make any changes in your interstate charter authority?

____Yes ____No ____Don't Know

If yes, what types of changes were sought and were they allowed by the ICC?

Type of Change	Allowed by ICC		
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know
____________	____Yes	____No	____Don't Know

7. Why did you want to make these interstate changes?____________________

____

____

8. Since July 1, 1980, have you made any intrastate charter service changes in Florida?

____Yes ____No ____Don't Know

If so, what types of changes were made?____________________

____

____

____

9. Why did you make these intrastate service changes?____________________

____

____

10. Do you anticipate making any intrastate charter service changes in Florida within the next 6 months?

____Yes ____No ____Don't Know

If so, what types of changes and why?____________________________

____

____

____

11. Since July 1, 1980, have you experienced any change in demand for your charter service in response to changes in intrastate regular-route service available in Florida?

____Yes ____No ____Don't Know

If so, what types of change and where have they taken place?

Type of Change in Demand		Location
____Increase	____Decrease	________________
____Increase	____Decrease	________________
____Increase	____Decrease	________________

12. Within the past 5 years, and prior to July 1, 1980, what was the trend in interstate charter fares?

____Increase ____Decrease ____No Change ____Don't Know

What was the magnitude of this change if any? ____________%

13. Within the past 5 years, and prior to July 1, 1980, what was the trend in intrastate charter fares in Florida?

____Increase ____Decrease ____No Change ____Don't Know

What was the magnitude of this change, if any? ____________%

What was the trend in intrastate tour packages?

____Increase ____Decrease ____No Change ____Don't Know

What was the magnitude of this change, if any? ____________%

14. Since July 1, 1980, has this carrier made any changes in interstate charter fares?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

Are these changes in effect for all areas served or just selected areas?

____All areas

____Selected areas

15. Since July 1, 1980, has this carrier made any changes in intrastate charter fares in Florida?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

Why was the change made? ______________________________

____

Have you made any changes in intrastate tour fares?

____Yes ____No ____Don't Know

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

Why was the change made? ______________________________

____

16. On average, how many competitors do you face on your intrastate Florida charter routes?

____

How many competitors on your tour services?

____

17. Has the amount of competition on your Florida charter routes changed since July 1, 1980?

____Yes ____No ____Don't Know

If so, in what way?

____Increase ____Decrease

What markets have experienced the most change in numbers of competitors?

____

____

____

Has the amount of competition on your tour services changed?

____Yes ____No ____Don't Know

If so, in what way?

____Increase

____Decrease

What markets have experienced the most change in numbers of competitors?

____

____

____

18. General Comments______________________________

____

____

____

D

QUESTIONNAIRE

MOTOR BUS SERVICE IN FLORIDA:

STUDY OF CHARTER AND TOUR BUS USERS

Name of Organization____

Address____

City and State______________________________Zip Code______________

Name and Title of Respondent____

Interviewer:______________________________Date______________

The U.S. Department of Transportation (DOT) and the Interstate Commerce Commission (ICC) are studying motor carrier service in Florida. An important aspect of this study is the availability and use of charter and tour bus service in Florida. This brief survey will provide the DOT and ICC with information on the operations of bus companies in Florida, most notably as to how rate and service decisions are determined.

Your participation in this survey is voluntary and your name will be used in our report only with your approval.

Thank you for your cooperation.

Part One: GENERAL INFORMATION

1. What is the main business or function of this organization?__________

2. How long has this organization been in operation?__________

3. Do you have branch offices elsewhere?

   ____Yes ____No

   If so, where?__________

4. General Comments__________

Part Two: SCOPE OF BUS-RELATED OPERATIONS

1. Does this organization arrange or make use of charter packages?

____Yes ____No ____Don't Know

If so, roughly what percentage of your charters are intrastate within Florida?

____%

Roughly what percentage of your charters make use of bus service?

____%

What other transportation services are used and to what extent?

AMTRAK ____%

Airlines ____%

Other (Specify____________________) ____%

2. Does this organization/attraction arrange or make use of tour packages?

____Yes ____No ____Don't Know

3. Does this organization/attraction have its own private bus fleet?

____Yes ____No ____Don't Know

If yes, how large is your fleet?____________________________________

For what types of service is the fleet used?________________________

____

____

4. What amount of charter business is arranged through or used by this organization/attraction?

   By revenue______________

   By volume of traffic______________

   By number of passengers______________

5. What are the 3 most frequent charter origins and/or destinations?

   1.______________

   2.______________

   3.______________

6. What has been tne general trend in the amount of charter business, by volume of traffic, generated here over the past 5 years?

   ____Increase ____Decrease ____No Change

   If there has been change, why was it made and to/from what regions has it been most evident?

   ____

   ____

7. Have you seen any changes in the amount of business coming to this attraction by charter bus over the past 5 years?

   ____Yes ____No ____Don't Know ____N/A

   If so, what type of change and roughly how much?

   ____Increase ____%

   ____Decrease

8. What amount of tour business is arranged through or used by this organization/attraction?

   By revenue______________

   By volume of traffic______________

9. What are the 3 most frequent tour origins and/or destinations?

1. ______________________

2. ______________________

3. ______________________

10. What has been the general trend in the amount of tour business, by volume of traffic, generated here over the past 5 years?

____Increase ____Decrease ____No change

If there has been change, why was it made and to what destinations has it been most evident?

____

____

11. Have you seen any changes in the amount of business coming to this attraction by tour bus over the past 5 years?

____Yes ____No ____Don't Know ____N/A

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

12. Does this organization/attraction make use of contract bus services?

____Yes ____No ____Don't know

If so, which carriers provide this service?

Interstate	Intrastate
____________________	____________________
____________________	____________________
____________________	____________________

What are the 3 most frequent contract carrier origins, destinations, and/or routes?

1. ______________________

2. ______________________

3. ______________________

13. What has been the general trend in the amount of contract carrier business generated here over the past 5 years?

____Increase ____Decrease ____No change

If there has been a change, why was it made and on what routes has it been most evident?

____

____

____

14. Have you seen any changes in the amount of business coming to this attraction by contract bus over the past 5 years?

____Yes ____No ____Don't Know ____N/A

If so, what type of change and roughly how much?

____Increase ____%

____Decrease

15. General Comments____

____

____

____

Part Three: AVAILABILITY OF BUS SERVICE

1. What charter service is available to this organization/attraction?

____

____

____

2. Within the past 5 years and prior to July 1, 1980, did charter service from any carrier(s) become less available or totally unavailable?

____Yes ____No ____Don't Know

If yes, which carriers were these and approximately when did they make these changes in service?

Company	Interstate or Intrastate	Service Stopped or Reduced	Approximate Date of Service Change
________	________	________	________
________	________	________	________
________	________	________	________

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes
________	________
	________
	________
________	________
	________
	________
________	________
	________
	________

3. What tour service is available to this organization/attraction?

____

____

____

4. Within the past 5 years and prior to July 1, 1980, did tour service from any carrier(s) become less available or totally unavailable?

____Yes ____No ____Don't Know

If yes, which carriers were these and approximately when did they make these changes in service?

Company	Service Stopped or Reduced	Approximate Date of Service Change

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes

5. Within the past 5 years and prior to July 1, 1980, did service from any contract carrier(s) become less available or totally unavailable?

____Yes ____No ____Don't Know

If yes, which carriers were these and approximately when did they make these changes in service?

Company	Service Stopped or Reduced	Approximate Date of Service Change

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes

6. Since July 1, 1980, have any charter carriers made their service less available or totally unavailable to this organization/attraction?

____Yes ____No ____Don't Know

If yes, which carriers and approximately when were these service changes made?

Company	Service Stopped or Reduced	Approximate Date of Service Change
____	____	____
____	____	____
____	____	____

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes
____	____
	____
	____
____	____
	____
	____
____	____
	____
	____

7. Has your business been affected by the availability of charter bus service in Florida since July 1, 1980?

____Yes ____No ____Don't Know

If so, in what way?____________________________________

____

8. Since July 1, 1980, have any tour operators made their service less available or totally unavailable to this organization/attraction?

____Yes ____No ____Don't Know

If yes, which operators were these and approximately when were these service changes made?

Company	Service Stopped or Reduced	Approximate Date of Service Change
____________	____________	____________
____________	____________	____________
____________	____________	____________

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes
____________	____________
	____________
	____________
____________	____________
	____________
	____________
____________	____________
	____________
	____________

9. Has your business been affected by the availability of tour bus service since July 1, 1980?

____Yes ____No ____Don't Know

If so, in what way?____

____

10. Since July 1, 1980, have contract carriers made their service less available or totally unavailable to this organization/attraction?

____Yes ____No ____Don't Know

If yes, which operators were these and approximately when were these service changes made?

Company	Service Stopped or Reduced	Approximate Date of Service Change
____________	____________	____________
____________	____________	____________
____________	____________	____________

What, if any, reasons were given by the carriers for these changes?

Company	Reasons for Service Changes
____________	____________
	____________
	____________
____________	____________
	____________
	____________
____________	____________
	____________
	____________

11. Has your business been affected by the availability of contract bus service in Florida since July 1, 1980?

____Yes ____No ____Don't Know

If so, in what way?____

____

12. Since July 1, 1980, have you become aware of any charter operators available to provide new or increased service?

____Yes ____No ____Don't Know

If yes, what are the names of these carriers and approximately when did you become aware of the new service?

Company	Interstate or Intrastate	New or Increased Service	Approximate Date

13. Have you made use of any of these new services?

____Yes ____No ____Don't Know

If so, from which carriers?

____

____

____

14. Since July 1, 1980, have you become aware of any tour operators available to provide new or increased service?

____Yes ____No ____Don't Know

If yes, what are the names of these operators and when did you become aware of the new service?

Company	New or Increased Service	Approximate Date

15. Have you made use of any of these new services?

____Yes ____No ____Don't Know

If so, from which operators?

____

____

____

16. Since July 1, 1980, have you become aware of any contract carriers available to provide new or increased service?

____Yes ____No ____Don't Know

If yes, what are the names of these operators and when did you become aware of the new service?

Company	New or Increased Service	Approximate Date
____________	____________	____________
____________	____________	____________
____________	____________	____________

17. Have you made use of any of these new services?

____Yes ____No ____Don't Know

If so, from which operators?

____

____

____

18. General Comments____

____

____

____

Part Four: DEMAND FOR AND USE OF BUS SERVICE

1. Prior to July 1, 1980, roughly what dollar volume of charter business was conducted through this organization/attraction on a monthly basis?

   $__________________/month

   What dollar volume of tour business?

   $__________________/month

   What dollar volume of contract carrier business?

   $__________________/month

2. Since July 1, 1980, roughly what dollar volume of charter business do you generally conduct through this organization/attraction on a monthly basis?

   $__________________/month

   What dollar volume of tour business?

   $__________________/month

   What dollar volume of contract carrier business?

   $__________________/month

3. Roughly what percentage of charter trips arranged by this organization/attraction are intrastate trips?

   ____%

   What percentage of contract trips?

   ____%

4. Since July 1, 1980, has the percentage of intrastate charter trips changed?

____Yes ____No ____Don't Know

If so, in what way?____

____

Has the percentage of intrastate contract trips changed?

____Yes ____No ____Don't Know

If so, in what way?____

____

5. Do you believe charter bus service now available to this organization/attraction is adequate?

____Yes ____No

If no, what changes do you feel are needed?____________________

____

____

6. Have charter fares in general changed over the past year?

____Yes ____No ____Don't Know

If so, what type of change, roughly how much, and when?

____Increase ____%

____Decrease

Time of change____

7. Are all charter carriers making generally the same type of charter fare changes, if any?

____Yes ____No ____Don't Know ____N/A

If no, please describe the carriers' behavior.__________________

____

____

8. Have tour fares in general changed over the past year?

____Yes ____No ____Don't Know

If so, what type of change, roughly how much, and when?

____Increase ____%

____Decrease

Time of change____

9. Are all tour operators making the same type of fare changes, if any?

____Yes ____No ____Don't Know ____N/A

If no, please describe the carriers' behavior.________________________

____

____

10. Have contract carrier fares in general changed over the past year?

____Yes ____No ____Don't Know

If so, what type of change, roughly how much, and when?

____Increase ____%

____Decrease

Time of change____

11. Are all contract carriers tour operators making the same type of fare changes, if any?

____Yes ____No ____Don't Know ____N/A

If no, please describe the carriers' behavior.________________________

____

____

12. General Comments ______________________________

____

____

____

Part Five: GENERAL TRENDS

1. Do you expect this organization's/attraction's demand for charter service to increase in the next 2 years?

   ____Yes ____No ____Don't Know

   If yes, what type of change and why?____________________

   ____

   ____

2. Do you expect your demand for tour service to change in the next 2 years?

   ____Yes ____No ____Don't Know

   If yes, what type of change and why?____________________

   ____

   ____

3. Do you expect your demand for contract carrier service to change in the next 2 years?

   ____Yes ____No ____Don't Know

   If yes, what type of change and why?____________________

   ____

   ____

4. Would you like to see any changes in the bus service available to this organization/attraction?

   ____Yes ____No ____Don't Know

   If so, what types of changes?____________________

   ____

   ____

5. General Comments______________________________